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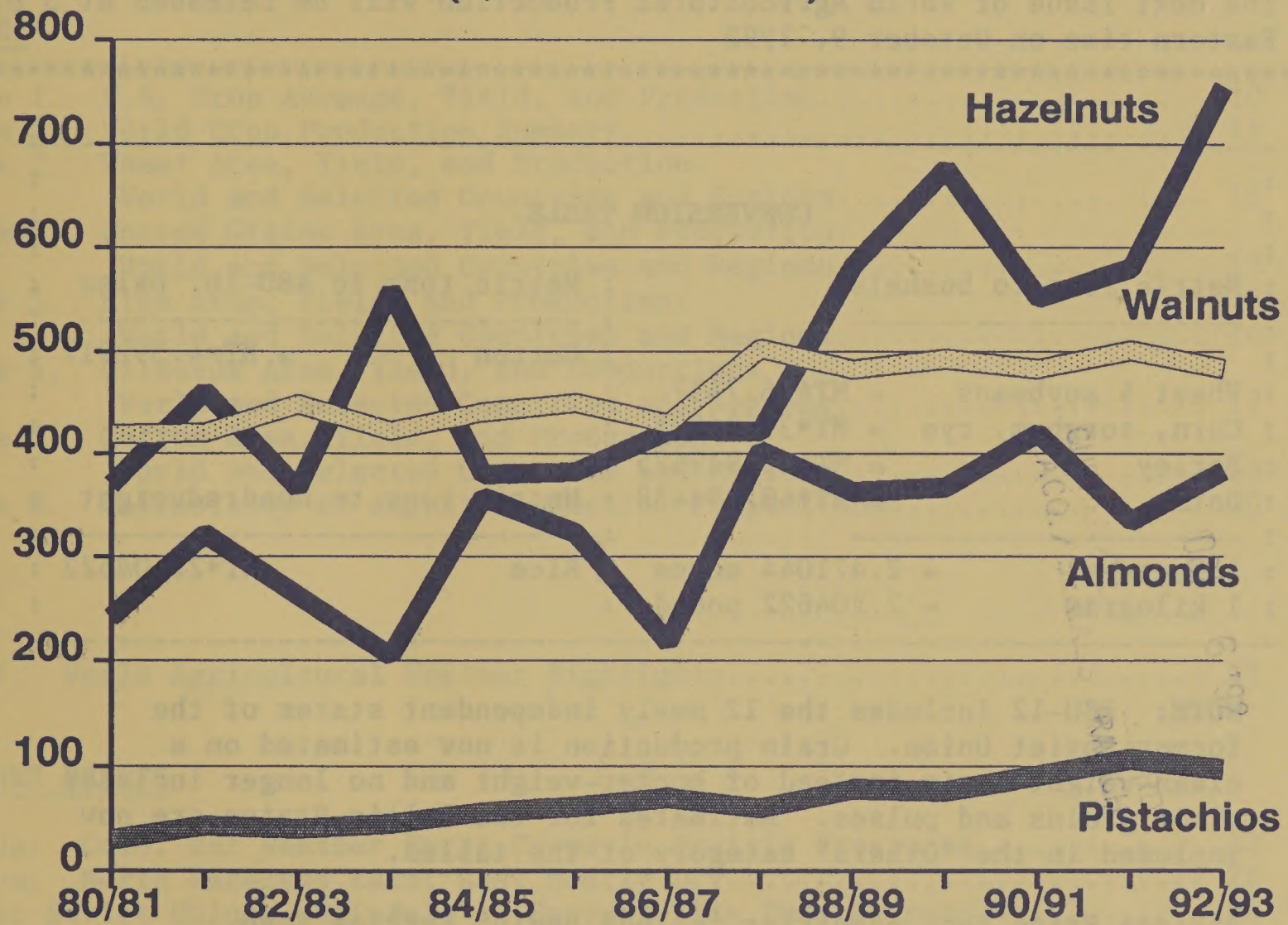


United States
Department of
Agriculture
Foreign
Agricultural
Service
Circular Series
WAP 9-92
September 1992

World Agricultural Production

Tree Nut Production 1/

(1,000 Metric Tons)



1/ Almonds = Shelled Basis; Filberts, Hazelnuts, Walnuts = Inshell Basis

Production Articles This Month...

Tree Nuts in Selected Countries

Asian Forestry Situation

This report draws on information from USDA's global network of agricultural attaches and counselors, official statistics of foreign governments, other foreign source materials, and results of office analysis. Estimates of U.S. acreage, yield, and production are from USDA's Agricultural Statistics Board, except where noted. Text and numbers in this report are based on unrounded data and detail may not add to totals because of rounding. This report reflects official USDA estimates released in World Agricultural Supply and Demand Estimates (WASDE-270) September 10, 1992.

This report was prepared by the Production Estimates and Crop Assessment Division (PECAD), FAS/USDA, Washington, D.C. 20250. Further information may be obtained by writing to the division or by calling (202) 720-0888 or by FAX (202) 720-8880.

 * The next issue of World Agricultural Production will be released at 3 p.m. *
 * Eastern time on October 9, 1992 *

:			:
:	CONVERSION TABLE		:
:			:
:	Metric tons to bushels	:	Metric tons to 480-lb. bales
:	-----	:	-----
:		:	Cotton = MT*4.592917
:	Wheat & soybeans = MT*36.7437	:	
:	Corn, sorghum, rye = MT*39.36825	:	
:	Barley = MT*45.929625	:	
:	Oats = MT*68.894438	:	Metric tons to hundredweight
:	-----	:	-----
:	1 hectare = 2.471044 acres	:	Rice = MT*22.04622
:	1 kilogram = 2.204622 pounds	:	

NOTE: FSU-12 includes the 12 newly independent states of the former Soviet Union. Grain production is now estimated on a clean-weight basis instead of bunker-weight and no longer includes minor grains and pulses. Estimates for the Baltic States are now included in the "Others" category of the tables.

African Franc Zone countries include Benin, Burkina Faso, Cameroon, Central African Republic, Chad, Cote d'Ivoire, Mali, Niger, Senegal, and Togo.

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PRODUCTION HIGHLIGHTS FOR 1992/93

September 1992

WHEAT: World production for 1992/93 is estimated at 539.4 million tons, up slightly from last month, but down 1 percent from last year. Total foreign production is estimated at 473.9 million tons, down 1.9 million or less than 1 percent from last month and down 3 percent from 1991/92. Country highlights are as follows:

- o United States Production is projected at 65.5 million tons, up 2.0 million or 3 percent from last month and up 22 percent from last year. Higher estimated spring wheat yield resulted in improved crop prospects.
- o India Production is estimated at 54.7 million tons, up 0.7 million or 1 percent from last month and up slightly from last year. The revision is based on a recently updated State harvested area estimate.
- o Other W. Europe Production is estimated at 3.7 million tons, up 0.3 million or 9 percent from last month, but down 11 percent from last year. Harvest results from Sweden indicate that yield was not affected severely by the drought.
- o EC-12 Production is estimated at 84.2 million tons, down 1.6 million or 2 percent from last month and down 7 percent from last year. Poor harvest conditions in the United Kingdom--due to heavy rains--reduced estimated output, and updated harvest results in Germany lowered production.
- o Argentina Production is forecast at 8.5 million tons, down 1.0 million or 11 percent from last month and down 13 percent from last year. Excessive rainfall caused planting disruptions.
- o Chile Production is estimated at 1.3 million tons, down 0.3 million or 16 percent from last month and down 17 percent from last year. Excessive rains during planting reduced estimated area.

COARSE GRAINS: World production for 1992/93 is forecast at 818.3 million tons, up slightly from last month and up 2 percent from the 1991/92 harvest. Total foreign production is forecast at 560.4 million tons, down 1.2 million or less than 1 percent from last month and down 4 percent from last year. Country highlights are as follows:

- o United States Production is estimated at 257.9 million tons, up 1.3 million or 1 percent from last month and up 18 percent from last year. Higher estimated yields for barley, corn, and sorghum increased estimated output.

- o India Production is estimated at 33.8 million tons, up 0.8 million or 2 percent from last month and up 18 percent from last year. Recent rains boosted the yield outlook for all coarse grains.
- o Other W. Europe Production is estimated at 9.4 million tons, up 0.5 million or 5 percent from last month, but down 25 percent from last year. Official harvest results from Sweden indicated that the drought was not as severe as earlier anticipated.
- o Philippines Production is estimated at 5.2 million tons, up 0.3 million or 5 percent from last month and up 15 percent from last year. Initial corn harvest results indicate higher-than-expected yields.
- o Canada Production is estimated at 20.2 million tons, down 1.2 million or 6 percent from last month and down 7 percent from last year. Freezing temperatures and wet weather negatively affected crop development and yield potential.
- o EC-12 Production is estimated at 79.6 million tons, down 1.2 million or 2 percent from last month and down 11 percent from last year. Revised harvest results from Germany, Portugal, and Spain lowered production prospects; however, barley output in France was raised.

RICE (MILLED-BASIS): World production for 1992/93 is forecast at 351.9 million tons, up 0.2 million from last month and up 1 percent from the 1991/92 crop. Total foreign production is projected at 346.7 million tons, up 0.3 million from last month and up 1 percent from 1991/92. Country highlights are as follows:

- o United States Production is estimated at 5.2 million tons, down 0.1 million or 1 from last month, but up 5 percent from last year. Lower estimated yield reduced the production outlook.
- o Vietnam Production is estimated at 13.2 million tons, up 0.4 million or 3 percent from last month, but down 5 percent from last year. A higher estimated yield boosted prospective output.
- o Indonesia Production is estimated at 29.8 million tons, up 0.2 million or 1 percent from last month and up 3 percent from last year. Continued favorable weather has raised the estimated yield on Java and helped replenish reservoirs.

o Pakistan

Production is estimated at 2.8 million tons, down 0.4 million or 13 percent from last month and down 12 percent from last year. Flood damage from heavy rains has adversely affected the crop in Sindh Province.

OILSEEDS: Total world oilseeds production during 1992/93 is forecast at a record 224.4 million tons, down 0.7 million or less than 1 percent from last month, but up 1 percent from 1991/92. Foreign production during 1992/93 is forecast to be a record 158.7 million tons, down 0.7 million or less than 1 percent from last month, but up 1 percent from last year. Total oilseed production in the United States is forecast at 65.7 million tons, down slightly from last month, but up 2 percent from 1991/92.

- * **Soybeans:** World production for 1992/93 is forecast at a record 109.8 million tons, down 0.1 million or less than 1 percent from last month, but up 4 percent from last year. Total foreign soybean production is forecast at 53.0 million tons, down 0.2 million or less than 1 percent from last month, but up 3 percent from 1991/92. Country highlights are as follows:

o United States

Production is estimated at 56.7 million tons, up 0.1 million or less than 1 percent from last month and up 5 percent from last year. The National Agricultural Statistics Service, USDA, slightly reduced expected yield.

o Canada

Production is estimated at 1.5 million tons, down 0.1 million or 6 percent from last month, but up 3 percent from 1991/92. Official Canadian statistics, based on survey data collected during the first half of August, lowered estimated yield by 6 percent due to continued cool weather.

o India

Production is estimated at 2.4 million tons, down 0.1 million or 4 percent from last month, but up 9 percent from 1991/92. Lower harvested area is forecast due to a poor beginning of the monsoon season, particularly in Madhya Pradesh.

- * **Cottonseed:** World cottonseed production for 1992/93 is projected at 35.3 million tons, down 0.4 million or 1 percent from last month and down 4 percent from last year. Total foreign production is forecast at 29.7 million tons, down 0.2 million or 1 percent from last month and down 2 percent from last year. Country highlights are as follows:

o United States

Production is estimated at 5.6 million tons, down 0.2 million or 4 percent from last month and down 11 percent from 1991/92. The National Agricultural Statistics Service, USDA, reduced both harvested area and yield.

- o Pakistan Production is estimated at 4.3 million tons, down 0.2 million or 3 percent from last month and down 2 percent from 1991/92. Harvested area is projected to fall as a result of the flood damage to cotton in the southern region of Sindh Province.
- o Mexico Production is estimated at 0.1 million tons, down 0.1 million or 55 percent from last month and down 76 percent from last year. Harvested cotton area in the eastern growing region is projected down due to excessive moisture and insect damage.
- * Peanuts: World production for 1992/93 is forecast at 22.8 million tons, up 0.3 million or 1 percent from last month and up 2 percent from 1991/92. Total foreign production is forecast at 20.8 million tons, up 0.3 million or 1 percent from last month and up 3 percent from last year. Country highlights are as follows:
 - o United States Production is estimated at 2.1 million tons, down 13,000 tons or 1 percent from last month and down 8 percent from 1991/92. The National Agricultural Statistics Service, USDA, reduced estimated yield.
 - o India Production is estimated at 8.3 million tons, up 0.3 million or 4 percent from last month and up 14 percent from 1991/92. After a slow start to the monsoon, timely summer rains have boosted yield projections.
- * Sunflowerseed: World production for 1992/93 is forecast at 22.3 million tons, up 0.1 million or less than 1 percent from last month and up 8 percent from 1991/92. Total foreign production is forecast at 21.0 million tons, up 0.1 million or less than 1 percent from last month and up 10 percent from last year. Country highlights are as follows:
 - o United States Production is estimated at 1.3 million tons, unchanged from last month, but down 21 percent from last year.
 - o India Production is estimated at 1.3 million tons, up 0.1 million or 8 percent from last month and up 13 percent from 1991/92. After a slow start to the monsoon, timely summer rains have boosted harvested area and yield projections.
- * Rapeseed: World production for 1992/93 is estimated at a 26.2 million tons, down 0.6 million or 2 percent from last month and down 8 percent from last year. Total foreign production is estimated at 26.1 million tons, down 0.6 million or 2 percent from last month and down 8 percent from last year. Country highlights are as follows:

- o United States Production is estimated at 84,000 tons, unchanged from last month, but up 1 percent from last year.
- o Canada Production is estimated at 3.7 million tons, down 0.4 million or 10 percent from last month and down 12 percent from 1991/92. This season's persistent cool conditions and early frost have reduced projected yield below the 5-year average.
- o EC-12 Production is estimated at 6.3 million tons, down 0.2 million or 2 percent from last month and down 15 percent from 1991/92. Germany's rapeseed harvest is complete, and because of poor yield reports, estimated output has been reduced to 2.6 million tons, down 0.2 million or 6 percent from last month.
- * Copra: World production for 1992/93 is forecast at 4.5 million tons, unchanged from last month, but down 2 percent from last year. There were no significant country changes this month.
- * Palm Kernels: World production for 1992/93 is forecast at a record 3.6 million tons, down 30,000 tons or 1 percent from last month, but up 3 percent from last year. There were no significant country changes this month.
- * Palm Oil: World production for 1992/93 is forecast at a record 12.1 million tons, unchanged from last month, but up 4 percent from last year. There were no significant country changes this month.

COTTON: World cotton production for 1992/93 is projected at 92.1 million bales, down 1.0 million or 1 percent from last month and down 3 percent from the 1991/92 record crop. Total foreign production is projected at 76.1 million bales, down 0.4 million or 1 percent from last month and down 2 percent from last year's record crop. Country highlights are as follows:

- o United States Production is estimated at 15.9 million bales, down 0.6 million or 4 percent from last month and down 9 percent from last year. A decline in both yields and area, due to cool temperatures, resulted in the reduced estimate.
- o Pakistan Production is estimated at 9.8 million bales, down 0.4 million or 4 percent from last month and down 2 percent from last year's record crop. Heavy rains in August resulted in flooding in the Sindh, damaging a large portion of the cotton crop.

TABLE 1

U.S. Crop Acreage, Yield, and Production 1/

COMMODITY	PLANTED AREA			HARVESTED AREA			YIELD			PRODUCTION		
	1990/91	Prel. 1991/92	Proj. 1992/93	1990/91	Prel. 1991/92	Proj. 1992/93	1990/91	Prel. 1991/92	1992/93 Proj. Aug. Sept.	1990/91	Prel. 1991/92	1992/93 Proj. Aug. Sept.
All Wheat Winter Other Rye	--Million acres--			--Million acres--			--Bushels per acre--			--Million bushels--		
	77.2	69.9	72.3	69.3	57.7	63.1	39.5	34.3	37.0	2,736	1,981	2,336
	56.9	51.0	51.1	49.9	39.4	42.6	40.7	34.8	37.6	2,031	1,372	1,601
	20.3	18.9	21.2	19.4	18.3	20.5	36.4	33.3	35.9	706	609	735
	1.6	1.7	1.6	0.4	0.4	0.4	27.1	24.6	25.6	10	10	10
Soybeans	57.8	59.1	59.1	56.5	58.0	58.1	34.1	34.3	35.8	1,926	1,986	2,079
Corn	74.2	76.0	79.3	67.0	68.8	72.2	118.5	108.6	121.3	7,934	7,474	8,762
Sorghum	10.5	11.0	13.5	9.1	9.8	12.3	63.1	59.0	67.7	573	579	834
Barley	8.2	8.9	7.8	7.5	8.4	7.3	56.1	55.2	54.1	422	464	395
Oats	10.4	8.7	8.0	5.9	4.8	4.8	60.1	50.6	57.6	358	243	276
Rice							--Pounds per acre--			--Million CWT--		
	2.9	2.9	3.0	2.8	2.8	3.0	5,529	5,617	5,607	156.1	154.5	166.4
All Cotton										--Million 480-pound bales--		
	12.4	14.1	13.4	11.7	13.0	11.2	634	652	696	15.5	17.6	16.5

1/ Except for estimated rye production, all estimates are from the USDA National Agricultural Statistics Service for 1990/91, 1991/92 and 1992/93. Production and yield estimates for rye are from the USDA Interagency Commodity Estimates Committee.

September 1992

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 2

World Crop Production Summary

Commodity	World	Total Foreign	North America			Europe		FSU-12 3/	Asia					South America		Selected Other		All Other Countries		
			United States	Canada	Mexico	EC-12	Oth. W. Europe		Eastern Europe	China	India	Indo-nesia	Paki- stan	Thai-land	Argen- tina	Brazil	Aus- tralia		South Africa	Turkey
—Million metric tons—																				
Wheat																				
1990/91	588.8	514.3	74.5	32.1	3.9	84.7	5.2	41.3	100.3	98.2	49.9	0.0	14.4	0.0	10.9	3.1	15.1	1.7	16.0	
1991/92 prel.	543.0	489.1	53.9	31.9	3.7	90.1	4.1	38.3	72.3	96.0	54.5	0.0	14.6	0.0	9.8	3.0	10.6	2.2	16.5	
1992/93 proj.																				
August	539.4	475.8	63.6	28.5	3.5	85.8	3.4	26.9	80.9	98.0	54.0	0.0	14.6	0.0	9.5	3.5	13.0	1.1	16.0	
September	539.4	473.9	65.5	28.5	3.5	84.2	3.7	26.9	80.9	98.0	54.7	0.0	14.6	0.0	8.5	3.5	13.0	1.1	16.0	
Coarse Grains																				
1990/91	820.6	589.9	230.7	24.9	18.4	84.0	13.5	51.4	99.4	111.7	32.9	5.2	2.9	4.1	10.8	24.4	6.7	8.9	9.3	
1991/92 prel.	801.4	582.9	218.5	21.7	17.6	89.6	12.5	64.5	73.1	112.3	28.6	5.3	2.3	3.8	14.3	29.3	7.9	3.6	9.6	
1992/93 proj.																				
August	818.2	561.6	256.6	21.4	16.8	80.9	9.0	50.2	80.7	109.9	33.0	5.3	2.2	3.8	13.0	25.8	7.5	8.5	9.1	
September	818.3	560.4	257.9	20.2	16.8	79.6	9.4	50.2	80.7	109.9	33.8	5.3	2.3	3.7	12.9	25.8	7.5	8.5	9.1	
Rice (Milled)																				
1990/91	353.1	348.0	5.1	0.0	0.2	1.6	0.0	0.1	1.4	132.5	74.6	29.4	3.3	11.3	0.3	6.8	0.5	0.0	0.2	
1991/92 prel.	347.2	342.2	4.9	0.0	0.2	1.4	0.0	0.1	1.3	128.7	71.5	28.8	3.2	13.3	0.4	7.0	0.7	0.0	0.1	
1992/93 proj.																				
August	351.7	346.4	5.3	0.0	0.2	1.4	0.0	0.1	1.5	129.5	73.0	29.7	3.2	13.2	0.3	7.1	0.6	0.0	0.2	
September	351.9	346.7	5.2	0.0	0.2	1.4	0.0	0.1	1.5	129.5	73.0	29.8	2.8	13.3	0.3	7.1	0.6	0.0	0.2	
Total Grains 1/																				
1990/91	1,762.5	1,452.2	310.3	56.9	22.5	170.3	18.7	92.7	201.1	342.4	157.3	34.6	20.6	15.4	22.0	34.3	22.3	10.6	25.5	
1991/92 prel.	1,691.5	1,414.2	277.3	53.7	21.5	181.2	16.6	102.8	146.7	337.0	154.6	34.1	20.1	17.1	24.5	39.3	19.2	5.8	26.2	
1992/93 proj.																				
August	1,709.3	1,383.8	325.5	49.9	20.5	168.1	12.4	77.1	163.1	337.4	160.0	34.9	20.0	17.0	22.8	36.4	21.1	9.6	25.3	
September	1,709.6	1,381.0	328.6	48.7	20.4	165.3	13.1	77.1	162.9	336.6	160.0	34.1	20.1	17.1	21.7	36.3	21.2	9.6	25.2	
Oilseeds 2/																				
1990/91	216.0	155.3	60.6	5.6	1.0	13.1	0.7	4.3	13.0	33.3	20.3	2.3	3.7	0.8	17.2	17.1	1.1	0.9	2.1	
1991/92 prel.	221.7	157.2	64.4	6.5	1.1	13.5	0.7	4.2	11.6	34.2	21.0	2.4	4.7	0.7	15.0	20.1	2.2	0.4	1.7	
1992/93 proj.																				
August	225.2	159.3	65.8	6.4	0.7	12.7	0.6	3.7	11.7	33.4	22.5	2.5	4.8	0.7	15.5	20.7	1.0	0.9	2.1	
September	224.4	158.7	65.7	5.3	0.6	12.3	0.6	3.6	11.6	33.4	22.4	2.5	4.7	0.7	15.1	20.7	1.0	0.9	2.1	
Cotton																				
1990/91	87.0	71.5	15.5	0.0	0.8	1.3	0.0	0.1	11.9	20.7	9.1	0.0	7.5	0.1	1.4	3.2	2.0	0.2	3.0	
1991/92 prel.	95.2	77.6	17.6	0.0	0.8	1.3	0.0	0.1	11.0	26.1	9.2	0.0	10.0	0.2	1.0	3.4	2.0	0.1	2.6	
1992/93 proj.																				
August	93.1	76.6	16.5	0.0	0.3	1.5	0.0	0.1	10.5	25.5	9.6	0.0	10.2	0.2	1.1	3.4	1.9	0.2	2.8	
September	92.1	76.1	15.9	0.0	0.2	1.5	0.0	0.1	10.5	25.5	9.6	0.0	9.8	0.2	1.1	3.4	1.9	0.2	2.8	

—Million 480-pound bales—

1/ Includes total of wheat, coarse grains, and rice (milled) shown above.

2/ Totals for major regions and countries include the five major oilseeds shown elsewhere in this report, while world and total foreign also includes copra and palm kernels for all countries.

3/ See note at the bottom of page 2.

Note: Entries of 0.0 indicate no reported or insignificant production.

September 1992

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 3

Wheat Area, Yield, and Production World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel. 1990/91	Proj. 1991/92	Proj. 1992/93	Prel. 1990/91	1992/93 1991/92	Aug	Proj. Sept	Prel. 1990/91	1992/93 1991/92	Aug	Proj. Sept
	---Million hectares---			---Metric tons per hectare---				---Million metric tons---			
World	231.5	221.2	220.6	2.54	2.45	2.44	2.45	588.8	543.0	539.4	539.4
United States	28.0	23.3	25.5	2.66	2.31	2.49	2.57	74.5	53.9	63.6	65.5
Total Foreign	203.5	197.8	195.1	2.53	2.47	2.43	2.43	514.3	489.1	475.8	473.9
Maj. Foreign Exporters	45.5	42.7	43.8	3.14	3.34	3.08	3.06	142.7	142.5	136.8	134.2
Argentina	5.7	4.6	4.3	1.91	2.15	1.90	1.98	10.9	9.8	9.5	8.5
Australia	9.2	7.2	8.5	1.63	1.48	1.53	1.53	15.1	10.6	13.0	13.0
Canada	14.1	14.2	14.1	2.28	2.26	2.02	2.02	32.1	31.9	28.5	28.5
EC-12	16.5	16.8	16.9	5.14	5.36	5.12	4.98	84.7	90.1	85.8	84.2
Major Importers	97.9	95.1	92.2	2.59	2.35	2.38	2.38	253.8	223.4	219.3	219.2
Brazil	3.3	2.1	2.3	0.94	1.43	1.52	1.52	3.1	3.0	3.5	3.5
China	30.8	30.9	30.7	3.19	3.10	3.20	3.20	98.2	96.0	98.0	98.0
Eastern Europe	9.8	9.9	8.0	4.23	3.88	3.35	3.35	41.3	38.3	26.9	26.9
Egypt	0.7	0.8	0.8	5.79	5.90	5.90	5.90	4.3	4.5	4.6	4.6
Other N. Africa 1/	5.4	5.6	5.0	1.04	1.55	0.90	0.90	5.7	8.6	4.5	4.5
Japan	0.3	0.2	0.2	3.66	3.18	3.58	3.72	1.0	0.8	0.9	0.8
FSU-12 2/	47.7	45.6	45.2	2.10	1.59	1.79	1.79	100.3	72.3	80.9	80.9
Other Foreign	60.1	60.1	59.1	1.96	2.05	2.02	2.04	117.8	123.1	119.7	120.5
India	23.5	24.0	23.3	2.12	2.27	2.31	2.35	49.9	54.5	54.0	54.7
Iran	6.5	6.7	7.0	1.26	1.34	1.36	1.36	8.2	8.9	9.5	9.5
Mexico	1.0	0.9	0.9	4.11	4.20	4.12	4.12	3.9	3.7	3.5	3.5
Other W. Europe	0.9	0.8	0.8	5.53	5.20	4.39	4.83	5.2	4.1	3.4	3.7
Pakistan	7.8	7.9	7.8	1.84	1.84	1.87	1.87	14.4	14.6	14.6	14.6
South Africa	1.6	1.4	0.6	1.10	1.53	1.79	1.79	1.7	2.2	1.1	1.1
Turkey	8.8	8.8	8.8	1.83	1.87	1.82	1.82	16.0	16.5	16.0	16.0
Others	10.0	9.7	9.9	1.85	1.93	1.76	1.75	18.5	18.7	17.6	17.4

1/ Algeria, Libya, Morocco, and Tunisia.

2/ See note at the bottom of page 2 referencing the FSU-12. Production for the Baltic States in 1990/91, 1991/92, and 1992/93 is estimated at 1.6, 1.2, and 0.8 million metric tons, respectively.

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Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 4
Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel. 1990/91	Proj. 1991/92	1992/93	Prel. 1990/91	1992/93 Aug	Proj. Sept		Prel. 1990/91	1992/93 Aug	Proj. Sept	
<i>TOTAL COARSE GRAINS</i>	---Million hectares---			---Metric tons per hectare---				---Million metric tons---			
World 1/	313.7	319.6	320.5	2.62	2.51	2.55	2.55	820.6	801.4	818.2	818.3
United States	36.4	37.3	39.3	6.34	5.85	6.54	6.57	230.7	218.5	256.6	257.9
Total Foreign	277.3	282.2	281.2	2.13	2.07	2.00	1.99	589.9	582.9	561.6	560.4
Maj. Foreign Exporters	20.0	20.5	20.6	2.77	2.50	2.57	2.56	55.3	51.3	54.2	52.8
Argentina	3.2	3.8	4.1	3.33	3.76	3.08	3.11	10.8	14.3	13.0	12.9
Australia	4.1	4.7	4.7	1.64	1.68	1.61	1.61	6.7	7.9	7.5	7.5
Canada	7.4	6.6	6.4	3.38	3.31	3.20	3.15	24.9	21.7	21.4	20.2
South Africa	3.7	3.9	4.0	2.40	0.92	2.13	2.13	8.9	3.6	8.5	8.5
Thailand	1.5	1.5	1.4	2.64	2.55	2.58	2.63	4.1	3.8	3.8	3.7
Major Importers	98.4	99.9	99.0	2.73	2.59	2.41	2.40	268.2	258.7	238.8	238.0
Eastern Europe	15.9	16.6	15.6	3.23	3.89	3.21	3.21	51.4	64.5	50.2	50.2
EC-12	19.2	19.1	18.5	4.37	4.69	4.34	4.30	84.0	89.6	80.9	79.6
Other W. Europe	3.0	2.9	2.7	4.45	4.38	3.27	3.51	13.5	12.5	9.0	9.4
Mexico	8.2	8.8	9.0	2.23	1.99	1.86	1.86	18.4	17.6	16.8	16.8
FSU-12 2/	51.6	52.1	52.8	1.93	1.40	1.53	1.53	99.4	73.1	80.7	80.7
Other Major Import. 3/	0.4	0.4	0.4	3.84	3.77	3.87	3.90	1.5	1.4	1.4	1.4
Other Foreign	159.0	161.8	161.6	1.68	1.69	1.67	1.67	266.4	272.9	268.6	269.5
Brazil	13.4	14.1	13.0	1.82	2.08	1.98	1.98	24.4	29.3	25.8	25.8
China	27.0	27.0	26.9	4.13	4.16	4.08	4.08	111.7	112.3	109.9	109.9
India	36.6	35.1	36.5	0.90	0.81	0.91	0.93	32.9	28.6	33.0	33.8
Indonesia	2.9	2.9	2.9	1.82	1.83	1.83	1.83	5.2	5.3	5.3	5.3
Nigeria	9.5	9.5	9.5	0.67	0.85	0.86	0.86	6.3	8.1	8.2	8.2
Philippines	3.9	3.5	3.9	1.32	1.29	1.26	1.32	5.1	4.5	4.9	5.2
Turkey	4.4	4.4	4.5	2.10	2.17	2.05	2.05	9.3	9.6	9.1	9.1
Others	61.3	65.3	64.4	1.17	1.15	1.13	1.12	71.5	75.2	72.3	72.2
<i>BARLEY</i>											
World	72.0	76.1	71.7	2.47	2.20	2.07	2.09	177.6	167.7	149.1	150.1
United States	3.0	3.4	3.0	3.02	2.97	2.91	3.17	9.2	10.1	8.6	9.4
Total Foreign	69.0	72.7	68.8	2.44	2.17	2.04	2.05	168.4	157.5	140.5	140.7
Australia	2.6	2.8	2.8	1.61	1.66	1.57	1.57	4.1	4.7	4.4	4.4
Canada	4.5	4.2	3.8	2.97	2.76	2.72	2.71	13.4	11.6	10.6	10.3
China	1.2	1.2	1.3	3.25	3.27	3.20	3.20	3.9	3.9	4.0	4.0
Eastern Europe	3.6	4.0	3.3	4.02	3.70	3.40	3.40	14.4	14.8	11.3	11.3
EC-12	12.3	12.1	11.7	4.12	4.26	3.70	3.72	50.8	51.6	43.2	43.6
Other W. Europe	1.5	1.5	1.4	4.37	4.17	3.02	3.30	6.4	6.4	4.4	4.7
Turkey	3.4	3.4	3.4	1.94	2.00	1.82	1.82	6.6	6.8	6.2	6.2
FSU-12 2/	25.2	27.5	25.5	1.98	1.33	1.53	1.53	50.0	36.5	39.0	39.0
Others	14.7	16.0	15.6	1.27	1.33	1.11	1.11	18.6	21.2	17.4	17.3

FOOTNOTES AT END OF TABLE.

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TABLE 4
Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel. 1990/91	Proj. 1991/92	1992/93	Prel. 1990/91	1991/92	1992/93 Proj. Aug	Sept	Prel. 1990/91	1991/92	1992/93 Proj. Aug	Sept
<u>OATS</u>	---Million hectares---			---Metric tons per hectare---				---Million metric tons---			
World	20.9	20.3	20.1	1.86	1.61	1.53	1.51	39.0	32.6	31.0	30.3
United States	2.4	1.9	1.9	2.16	1.81	2.07	2.07	5.2	3.5	4.0	4.0
Total Foreign	18.5	18.4	18.2	1.83	1.58	1.47	1.45	33.8	29.1	26.9	26.3
FSU-12 2/	10.4	10.5	10.2	1.46	1.15	1.13	1.13	15.1	12.1	11.5	11.5
Maj. Foreign Exporters	2.9	2.7	3.1	2.15	1.97	1.80	1.77	6.2	5.4	5.8	5.5
Argentina	0.3	0.4	0.4	1.34	1.14	1.29	1.29	0.4	0.4	0.5	0.5
Australia	1.1	1.2	1.1	1.43	1.47	1.36	1.36	1.5	1.8	1.5	1.5
Canada	1.2	0.8	1.3	2.33	2.13	2.21	2.08	2.7	1.8	3.1	2.7
Sweden	0.4	0.3	0.3	4.42	4.13	2.00	2.37	1.6	1.4	0.7	0.8
Other Foreign	5.3	5.1	4.9	2.38	2.27	1.98	1.90	12.5	11.6	9.6	9.3
China	0.6	0.6	0.5	1.18	1.18	1.19	1.19	0.7	0.7	0.6	0.6
Eastern Europe	1.2	1.2	1.2	2.70	2.43	1.96	1.96	3.3	2.9	2.3	2.3
Czechoslovakia	0.1	0.1	0.1	4.53	3.89	3.24	3.24	0.4	0.3	0.3	0.3
Poland	0.7	0.7	0.7	2.84	2.73	2.08	2.08	2.1	1.9	1.4	1.4
EC-12	1.5	1.4	1.3	3.14	3.19	2.99	2.70	4.7	4.4	3.9	3.6
France	0.2	0.2	0.2	3.88	4.23	4.12	4.12	0.8	0.7	0.7	0.7
Germany	0.5	0.4	0.4	4.45	4.91	4.38	3.65	2.1	1.9	1.7	1.3
Finland	0.5	0.3	0.3	3.23	3.37	2.58	2.54	1.5	1.2	0.9	0.8
Norway	0.1	0.1	0.1	4.38	4.60	3.20	3.20	0.6	0.5	0.3	0.3
Others	1.4	1.5	1.4	1.31	1.28	1.13	1.13	1.8	1.9	1.6	1.6
<u>RYE</u>											
World	15.9	13.1	14.9	2.32	1.97	1.67	1.64	36.9	25.8	25.0	24.5
United States	0.2	0.2	0.2	1.70	1.55	1.61	1.61	0.3	0.2	0.3	0.3
Total Foreign	15.8	13.0	14.8	2.32	1.97	1.67	1.64	36.6	25.6	24.8	24.2
FSU-12 2/	10.2	8.3	10.5	2.08	1.49	1.40	1.40	21.2	12.3	14.7	14.7
Maj. Foreign Exporter											
Canada	0.3	0.2	0.1	1.76	1.87	1.72	1.77	0.6	0.3	0.3	0.2
Other Foreign											
Eastern Europe	2.7	2.6	2.3	2.67	2.59	2.04	2.04	7.2	6.8	4.6	4.6
Hungary	0.1	0.1	0.1	2.46	2.38	2.00	2.00	0.2	0.2	0.1	0.1
Poland	2.3	2.3	2.0	2.61	2.58	2.00	2.00	6.0	5.9	4.0	4.0
Czechoslovakia	0.2	0.1	0.1	4.30	3.81	3.58	3.58	0.7	0.5	0.3	0.3
EC-12	1.6	1.2	1.1	3.34	3.68	3.39	3.10	5.3	4.4	3.9	3.4
Denmark	0.1	0.1	0.1	4.95	4.94	3.88	3.88	0.5	0.4	0.3	0.3
Germany	1.1	0.7	0.6	3.78	4.68	4.42	3.93	4.0	3.3	3.0	2.4
Others	1.0	0.7	0.8	2.46	2.45	1.63	1.66	2.4	1.7	1.2	1.3

1/ Total of barley, corn, sorghum, oats, and rye shown below, plus millet and mixed grain. 2/ See note at the bottom of page 2 referencing the FSU-12. Total coarse grains production for the Baltic States in 1990/91, 1991/92, and 1992/93 is estimated at 3.9, 4.3, and 2.4 million metric tons, respectively. 3/ Japan, Republic of Korea, and Taiwan.

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TABLE 4
Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel. 1990/91	Proj. 1991/92	1992/93	Prel. 1990/91	1991/92	1992/93 Proj. Aug	Sept	Prel. 1990/91	1991/92	1992/93 Proj. Aug	Sept
<u>CORN</u>	---Million hectares---			---Metric tons per hectare---				---Million metric tons---			
World	127.0	130.8	133.4	3.76	3.71	3.87	3.87	478.1	485.3	515.6	515.8
United States	27.1	27.9	29.2	7.44	6.82	7.61	7.62	201.5	189.9	222.6	222.8
Total Foreign	99.9	102.9	104.2	2.77	2.87	2.82	2.81	276.5	295.5	293.0	293.0
Maj. Foreign Exporters	6.3	7.0	7.3	3.11	2.51	2.87	2.87	19.7	17.5	21.0	21.0
Argentina	2.0	2.4	2.7	3.90	4.42	3.52	3.52	7.6	10.6	9.5	9.5
South Africa	3.0	3.3	3.4	2.74	1.02	2.39	2.39	8.3	3.3	8.0	8.0
Thailand	1.4	1.3	1.3	2.81	2.73	2.78	2.78	3.8	3.6	3.5	3.5
Major Importers	19.7	21.5	22.7	3.47	4.01	3.64	3.63	68.3	86.1	83.2	82.5
Eastern Europe	6.4	6.7	7.0	3.13	5.00	3.98	3.98	20.1	33.7	27.9	27.9
EC-12	3.5	3.9	3.8	6.27	6.85	6.97	6.97	21.9	26.5	27.1	26.4
Other W. Europe	0.2	0.2	0.2	8.18	8.41	8.06	8.07	1.9	1.8	1.7	1.7
Mexico	6.6	7.7	7.9	2.14	1.88	1.77	1.77	14.1	14.5	14.0	14.0
FSU-12 2/	2.9	2.8	3.7	3.46	3.19	3.24	3.24	9.9	9.0	12.0	12.0
Other Maj. Import. 3/	0.1	0.1	0.1	4.99	4.54	4.78	4.78	0.5	0.5	0.5	0.5
Other Foreign	73.9	74.5	74.1	2.55	2.58	2.56	2.56	188.5	191.9	188.9	189.5
Brazil	12.9	13.6	12.5	1.84	2.10	2.00	2.00	23.7	28.5	25.0	25.0
Canada	1.1	1.1	1.0	6.92	6.71	6.60	6.50	7.3	7.4	7.0	6.5
China	21.4	21.6	21.5	4.52	4.58	4.47	4.47	96.8	98.8	96.0	96.0
Egypt	0.8	0.7	0.9	5.47	6.24	5.75	5.75	4.6	4.4	5.0	5.0
India	6.0	5.8	6.0	1.52	1.50	1.55	1.58	9.1	8.7	9.0	9.4
Indonesia	2.9	2.9	2.9	1.82	1.83	1.83	1.83	5.2	5.3	5.3	5.3
Philippines	3.9	3.5	3.9	1.32	1.29	1.26	1.32	5.1	4.5	4.9	5.2
Zimbabwe	1.1	0.9	1.2	1.44	0.41	1.50	1.50	1.6	0.4	1.8	1.8
Others	23.9	24.5	24.3	1.46	1.39	1.45	1.46	35.1	34.0	34.9	35.4
<u>SORGHUM</u>											
World	38.8	39.5	40.8	1.35	1.33	1.50	1.50	52.4	52.5	61.1	61.1
United States	3.7	4.0	5.0	3.96	3.70	4.25	4.32	14.6	14.7	21.2	21.5
Total Foreign	35.1	35.5	35.8	1.08	1.06	1.12	1.11	37.9	37.7	39.9	39.6
Argentina	0.7	0.7	0.8	3.33	3.61	3.07	3.07	2.3	2.6	2.3	2.3
Australia	0.4	0.6	0.6	2.22	2.14	2.06	2.06	0.9	1.2	1.3	1.3
China	1.5	1.4	1.5	3.67	3.50	3.52	3.52	5.7	4.9	5.1	5.1
India	14.5	13.7	14.5	0.82	0.70	0.83	0.85	11.9	9.6	12.0	12.3
Mexico	1.3	0.8	0.8	2.85	3.17	2.93	2.93	3.7	2.6	2.2	2.2
Nigeria	4.4	4.4	4.4	0.64	0.80	0.84	0.84	2.8	3.5	3.7	3.7
South Africa	0.1	0.1	0.1	2.09	0.70	2.00	2.00	0.2	0.1	0.3	0.3
Sudan	3.0	4.4	4.2	0.50	0.80	0.85	0.70	1.5	3.5	3.5	2.9
Thailand	0.2	0.2	0.2	1.42	1.18	1.38	1.44	0.3	0.2	0.3	0.2
Others	9.0	9.2	8.8	0.97	1.03	1.05	1.05	8.7	9.6	9.3	9.2

FOOTNOTES AT END OF TABLE.

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TABLE 5

Rice Area, Yield, and Production World and Selected Countries and Regions

	AREA		YIELD			PRODUCTION (Rough Basis)			MILLING RATE			PRODUCTION (Milled Basis)			
	Prel. 1990/91	Proj. 1992/93	Prel. 1990/91	Prel. 1991/92	1992/93 Proj. Aug Sept	Prel. 1990/91	Prel. 1991/92	1992/93 Proj. Aug Sept	Prel. 1990/91	Prel. 1991/92	1992/93 Proj. Aug Sept	Prel. 1990/91	Prel. 1991/92	1992/93 Proj. Aug Sept	
	—Million hectares—		—Metric tons per hectare—			—Million metric tons—			—Percent—			—Million metric tons—			
World	147.2	145.5	147.2	3.5	3.5	521.1	512.8	519.5	519.9	67.8	67.7	67.7	353.1	347.2	351.9
United States	1.1	1.1	1.2	6.2	6.3	7.1	7.0	7.5	7.4	72.0	70.5	70.0	5.1	4.9	5.2
Total Foreign	146.1	144.4	146.0	3.5	3.5	514.0	505.8	512.0	512.4	67.7	67.7	67.5	348.0	342.2	346.7
Maj. Foreign Exporters	15.7	16.2	16.2	2.3	2.3	35.8	37.8	37.8	37.4	63.8	64.1	64.0	22.8	24.2	23.9
Burma	4.8	4.5	4.6	2.9	2.8	13.7	12.8	13.0	13.0	60.0	60.0	60.0	8.2	7.7	7.8
Pakistan	2.1	2.0	1.8	2.3	2.4	4.9	4.8	4.8	4.2	66.7	66.7	66.7	3.3	3.2	2.8
Thailand	8.8	9.7	9.8	2.0	2.1	17.2	20.2	20.0	20.2	66.0	66.0	66.0	11.3	13.3	13.3
Major Importers	14.1	13.6	13.9	4.2	4.2	59.5	57.6	58.8	59.0	66.0	66.0	66.0	39.2	38.0	38.9
EC-12	0.4	0.4	0.3	6.4	6.0	2.4	2.2	2.2	2.2	67.1	65.2	67.0	1.6	1.4	1.4
Indonesia	10.5	10.2	10.5	4.3	4.3	45.2	44.3	45.6	45.8	65.0	65.0	65.0	29.4	28.8	29.7
Nigeria	0.7	0.6	0.7	1.4	1.3	0.9	0.8	0.9	0.9	60.0	60.0	60.0	0.5	0.5	0.5
Republic of Korea	1.2	1.2	1.2	6.2	6.1	7.7	7.4	7.3	7.3	72.5	72.5	72.5	5.6	5.4	5.3
Other Maj. Import. 1/	1.3	1.3	1.3	2.5	2.3	3.2	2.9	2.8	2.8	65.6	66.0	65.9	2.1	1.9	1.9
Other Foreign	116.3	114.6	115.9	3.6	3.6	418.8	410.4	415.4	416.1	68.3	68.2	68.2	285.9	280.0	283.9
Australia	0.1	0.1	0.1	8.9	8.8	0.8	1.1	1.0	1.0	61.8	62.0	61.9	0.5	0.7	0.6
Bangladesh	10.4	10.2	10.3	2.6	2.7	26.8	27.7	27.9	27.9	66.7	66.7	66.7	17.9	18.5	18.6
Brazil	4.6	5.0	5.1	2.2	2.1	10.0	10.3	10.5	10.5	68.0	68.0	68.0	6.8	7.0	7.1
China	33.1	32.6	32.5	5.7	5.6	189.3	183.8	185.0	185.0	70.0	70.0	70.0	132.5	128.7	129.5
India	42.6	41.5	42.3	2.6	2.6	111.9	107.3	109.5	109.5	66.7	66.7	66.7	74.6	71.5	73.0
Japan	2.1	2.0	2.1	6.3	5.9	13.1	12.0	13.5	13.5	72.8	72.8	72.8	9.6	8.7	9.8
Philippines	3.4	3.3	3.5	2.9	2.8	9.9	9.1	9.8	9.8	65.0	65.0	65.0	6.4	5.9	6.4
FSU-12 2/	0.6	0.6	0.6	3.5	3.4	2.2	2.0	2.3	2.3	65.0	65.0	65.0	1.4	1.3	1.5
Vietnam	6.3	6.2	6.2	3.0	3.4	18.8	21.0	19.4	20.0	66.0	66.0	66.0	12.4	13.9	13.2
Others	13.2	13.0	13.2	2.7	2.8	36.0	36.1	36.5	36.6	66.3	66.2	66.1	23.8	23.9	24.2

1/ Hong Kong, Iran, Iraq, Cote d'Ivoire, and Saudi Arabia.

2/ See note at the bottom of page 2 referencing the FSU-12.

September 1992

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 6
Oilseeds Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel.		Proj.	Prel.		1992/93 Proj.		Prel.		1992/93 Proj.	
	1990/91	1991/92	1992/93	1990/91	1991/92	Aug	Sept	1990/91	1991/92	Aug	Sept
	---Million hectares---			---Metric tons per hectare---				---Million metric tons---			
<u>SOYBEANS</u>											
World	54.06	54.59	55.59	1.92	1.93	1.97	1.97	103.98	105.34	109.83	109.76
United States	22.87	23.45	23.50	2.29	2.30	2.41	2.41	52.42	54.04	56.59	56.73
Total Foreign	31.19	31.14	32.09	1.65	1.65	1.65	1.65	51.56	51.30	53.23	53.03
Maj. Foreign Exporters	14.40	14.80	15.40	1.89	1.97	1.95	1.95	27.25	29.10	30.05	30.05
Argentina	4.75	4.80	4.90	2.42	2.21	2.20	2.20	11.50	10.60	10.80	10.80
Brazil	9.65	10.00	10.50	1.63	1.85	1.83	1.83	15.75	18.50	19.25	19.25
Other Foreign	16.79	16.34	16.69	1.45	1.36	1.38	1.38	24.31	22.20	23.18	22.98
Canada	0.48	0.60	0.64	2.61	2.44	2.50	2.36	1.26	1.46	1.60	1.50
China	7.56	7.05	7.30	1.46	1.38	1.38	1.38	11.00	9.71	10.10	10.10
Eastern Europe	0.34	0.25	0.27	1.06	1.34	1.12	1.12	0.36	0.34	0.30	0.30
EC-12	0.66	0.48	0.43	3.11	3.13	3.08	3.08	2.07	1.51	1.31	1.31
India	2.37	2.60	2.60	1.02	0.85	0.93	0.92	2.42	2.20	2.50	2.40
Indonesia	1.28	1.33	1.38	1.10	1.11	1.11	1.11	1.40	1.48	1.53	1.53
Paraguay	0.89	0.90	0.98	1.46	1.33	1.63	1.63	1.30	1.20	1.60	1.60
FSU-12 1/	0.83	0.81	0.83	1.06	1.14	1.14	1.14	0.88	0.92	0.94	0.94
Others	2.39	2.31	2.28	1.52	1.46	1.45	1.45	3.63	3.39	3.31	3.31
<u>COTTONSEED</u>											
World	32.97	34.91	33.30	1.02	1.05	1.06	1.06	33.50	36.71	35.72	35.30
United States	4.75	5.25	4.53	1.14	1.20	1.25	1.23	5.42	6.28	5.77	5.57
Total Foreign	28.22	29.67	28.77	1.00	1.03	1.03	1.03	28.08	30.43	29.95	29.73
China	5.59	6.54	6.65	1.37	1.48	1.41	1.41	7.67	9.66	9.36	9.36
India	7.40	7.68	7.50	0.53	0.52	0.56	0.56	3.90	4.01	4.20	4.20
Pakistan	2.66	2.88	2.70	1.23	1.51	1.55	1.58	3.28	4.36	4.42	4.27
FSU-12 1/	3.17	3.00	2.87	1.54	1.45	1.43	1.45	4.88	4.35	4.11	4.15
Others	9.40	9.56	9.05	0.89	0.84	0.86	0.86	8.36	8.05	7.85	7.75
<u>PEANUTS</u>											
World	19.39	19.88	19.58	1.15	1.13	1.15	1.17	22.32	22.38	22.53	22.81
United States	0.73	0.82	0.71	2.23	2.74	2.92	2.90	1.63	2.24	2.07	2.05
Total Foreign	18.66	19.07	18.87	1.11	1.06	1.08	1.10	20.69	20.14	20.46	20.76
Argentina	0.22	0.16	0.15	2.61	2.50	2.24	2.24	0.57	0.40	0.33	0.33
China	2.91	2.88	2.95	2.19	2.19	1.97	1.97	6.37	6.30	5.80	5.80
India	8.30	8.75	8.50	0.92	0.83	0.94	0.98	7.62	7.30	8.00	8.30
Senegal	0.91	0.87	0.88	0.77	0.83	0.82	0.82	0.70	0.72	0.73	0.73
South Africa	0.09	0.20	0.10	1.30	0.57	1.30	1.30	0.11	0.12	0.13	0.13
Sudan	0.54	0.53	0.55	0.60	0.75	0.71	0.71	0.33	0.40	0.39	0.39
Others	5.69	5.67	5.75	0.88	0.86	0.89	0.89	4.99	4.90	5.09	5.09

FOOTNOTES AT END OF TABLE.

TABLE 6
Oilseeds Area, Yield, and Production
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel.		Proj.	Prel.		1992/93 Proj.		Prel.		1992/93 Proj.	
	1990/91	1991/92	1992/93	1990/91	1991/92	Aug	Sept	1990/91	1991/92	Aug	Sept
<u>SUNFLOWERSEED</u>	---Million hectares---			---Metric tons per hectare---				---Million metric tons---			
World	16.40	16.49	16.96	1.40	1.25	1.32	1.31	22.90	20.64	22.23	22.29
United States	0.75	1.08	0.83	1.38	1.51	1.56	1.56	1.03	1.64	1.30	1.30
Total Foreign	15.65	15.41	16.12	1.40	1.23	1.31	1.30	21.87	19.00	20.93	20.99
Argentina	2.30	2.50	2.40	1.83	1.28	1.50	1.50	4.20	3.20	3.60	3.60
China	0.71	0.75	0.73	1.88	1.47	1.45	1.45	1.34	1.10	1.05	1.05
EC-12	2.61	2.35	2.71	1.64	1.69	1.59	1.59	4.26	3.97	4.33	4.30
East Europe	1.23	1.27	1.26	1.71	1.73	1.65	1.65	2.10	2.19	2.07	2.07
FSU-12 1/	4.67	4.50	4.60	1.41	1.25	1.33	1.33	6.56	5.64	6.10	6.10
Others	4.14	4.05	4.44	0.82	0.72	0.87	0.88	3.40	2.90	3.78	3.88
<u>RAPESEED</u>											
World	18.21	20.39	20.19	1.38	1.40	1.33	1.30	25.14	28.53	26.76	26.18
United States	0.03	0.06	0.06	1.74	1.43	1.42	1.42	0.05	0.08	0.08	0.08
Total Foreign	18.18	20.33	20.13	1.38	1.40	1.32	1.30	25.08	28.44	26.68	26.09
Canada	2.53	3.14	3.10	1.29	1.34	1.31	1.19	3.27	4.22	4.10	3.70
China	5.50	6.10	6.05	1.26	1.22	1.17	1.17	6.96	7.44	7.10	7.10
EC-12	2.14	2.42	2.32	2.87	3.04	2.78	2.69	6.15	7.34	6.41	6.26
East Europe	0.74	0.71	0.63	2.39	2.28	2.08	1.99	1.76	1.63	1.30	1.26
India	5.72	6.30	6.40	0.90	0.95	0.97	0.97	5.15	6.00	6.20	6.20
Others	1.54	1.66	1.63	1.17	1.09	0.93	0.97	1.80	1.81	1.58	1.58
<u>MAJOR OILSEEDS</u>	141.03	146.27	145.62	1.47	1.46	1.48	1.49	207.83	213.59	217.06	216.35
United States	29.23	30.79	29.77	2.07	2.09	2.14	2.21	60.55	64.28	65.82	65.74
Total Foreign	111.79	115.48	115.85	1.32	1.29	1.31	1.30	147.28	149.31	151.25	150.61
<u>COPRA</u>	--	--	--	--	--	--	--	4.83	4.57	4.47	4.47
<u>PALM KERNEL</u>	--	--	--	--	--	--	--	3.32	3.50	3.63	3.60
<u>TOTAL OILSEEDS</u>	--	--	--	--	--	--	--	215.98	221.66	225.16	224.42
<u>PALM OIL 2/</u>	--	--	--	--	--	--	--	11.09	11.63	12.14	12.14

1/ See note at the bottom of page 2. 2/ Not included in total oilseeds.

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Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 7
Cotton Area, Yield, and Production
World and Selected Countries and Regions

Country/Region*	Area			Yield			Production			Change In Production				
	1992/93 Proj.			1992/93 Proj.			1992/93 Proj.			From Last Month		From Last Year		
	Prel. 1990/91	1991/92	Aug 1992	Prel. 1990/91	1991/92	Aug 1992	Prel. 1990/91	1991/92	Aug 1992	Sept	MBales	Percent	MBales	Percent
	</													

* See regional definitions on page 2.

September 1992

Production Estimates & Crop Assessment Division, FAS, USDA

TABLE 8

The table below presents a 11-year record of the difference between the September projections and the final estimates. Using world wheat production as an example, changes between the September projection and the final estimate have averaged 10.8 million tons (2.1 percent) and ranged from -30.7 to 9.4 million tons. The September projection has been below the final 6 times and above the final 5 times.

RELIABILITY OF PRODUCTION PROJECTIONS

COMMODITY AND REGION	PROJECTION AND FINAL ESTIMATES, 1981/82 – 1991/92 1/					
	Difference		Lowest	Highest	Below	Above
	Average	Average	Difference		Final	Final
	Percent	---Million metric tons---			Number of years 2/	
WHEAT						
World	2.1	10.8	–30.7	9.4	6	5
U.S.	0.9	0.6	–1.2	0.9	5	6
Foreign	2.5	11.0	–30.9	8.5	6	5
COARSE GRAINS 3/						
World	1.1	8.7	–22.6	11.3	9	2
U.S.	2.7	5.3	–12.9	6.1	8	3
Foreign	1.4	8.0	–18.9	9.1	5	6
RICE (Milled)						
World	2.6	8.2	–24.1	3.4	10	1
U.S.	4.2	0.2	–0.4	0.3	8	3
Foreign	2.6	8.1	–24.4	3.6	10	1
SOYBEANS						
World	2.7	2.5	–4.4	4.7	5	6
U.S.	4.4	2.3	–4.6	4.6	6	5
Foreign	5.0	2.1	–3.2	4.6	4	7
		---Million 480-lb. bales---				
COTTON						
World	3.1	2.5	–10.9	4.5	7	4
U.S.	4.2	0.6	–1.9	0.8	5	5
Foreign	3.3	2.3	–11.2	3.7	6	5
UNITED STATES		-----Million bushels-----				
CORN	5.0	292	–599	1,071	7	4
SORGHUM	5.8	41	–82	83	8	3
BARLEY	3.1	16	–19	46	5	6
OATS	4.8	19	–26	57	4	7

1/ The final estimate for 1981/82-1990/91 is defined as the first November estimate following the marketing year.

2/ May not total 11 if projection was the same as the final.

3/ Includes corn, sorghum, barley, oats, rye, millet, and mixed grain.

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Production Estimates and Crop Assessment Division, FAS, USDA

WORLD AGRICULTURAL WEATHER HIGHLIGHTS

SEPTEMBER 10, 1992



5 - FSU: WEST

Unseasonably warm, dry weather in August favors winter and spring grain harvests but limits moisture for filling summer crops. Planting of 1993 winter grain crops begins.

6 - FSU: NEW LANDS

Cool, wet weather in August benefits spring grains in the filling stage but slows crop development.

7 - SOUTH ASIA

Showers were timely for filling grains, oilseeds, and cotton in most of India and Pakistan, but flooding occurs from isolated inundating rains. The drying trend continues over southern interior, but rain in late August helps fall planting.

8 - EASTERN ASIA

Recent tropical cyclones bring excessive rains to portions of eastern China, Taiwan and North Korea. The rains could cause possible damage to mature cotton in eastern China. Dry and sunny weather aids maturing single-crop rice across southern China.

9 - SOUTHEAST ASIA

Heavy showers cause flooding along the Mekong but dryness reduces moisture for late planted grains along Thailand's Chao Phraya River. Unseasonable showers boost irrigation for Java's rice. Flooding from Typhoons hits the northwestern Philippines but drought persists elsewhere.

10 - AUSTRALIA

Most crop areas received normal to above normal August rains, benefiting vegetative wheat. Recent rains greatly improve soil moisture across the eastern wheat belt.

3 - SOUTH AMERICA

Argentina receives beneficial moisture during early September, alleviating previous dryness. Southern Brazil continues to be well-watered, favoring pre-planting moisture for summer crops.

4 - EUROPE

Wet weather slows grain harvesting in the northwest, but provides favorable soil moisture for winter crop planting. Recent cooler, showery weather in the east eases the moisture deficit.

1 - UNITED STATES

Persistent cool, wet weather slows crop maturation across parts of the corn belt, and northern Great Plains. Wet fields delay harvest of spring grains from Montana to Minnesota. Hurricane Andrew damages some sugar cane in south Florida and Louisiana. Dryness continued forest fire problems in the western States.

2 - CANADA

An early freeze causes damage to immature spring grains and canola, slowed in development by this summer's cool, wet weather. Widespread, locally heavy showers, some falling as snow, hamper harvests and reduce quality.

(More details are available in the Weekly Weather and Crop Bulletin. Subscription information may be obtained by calling (202) 720-7917.)

WEATHER BRIEFS

CANADA: COLD, WET WEATHER HURTS CROPS IN PRAIRIE PROVINCES

Abnormally cold weather, which occurred during much of the growing season across the Canadian Prairie Provinces, continued during August 11 through September 10, 1992. Cooler-than-normal conditions slowed crop development and increased the likelihood of frost and freeze damage to late-maturing crops. Temperatures dropped below freezing across Alberta and the northern crop areas of Saskatchewan during mid-August and again during the last week of August, causing damage to late-maturing spring grains and summer crops. On September 7 and 8, freezing temperatures crossed the Prairies into Manitoba and dipped south into the United States, bringing an end to the Prairie Provinces' growing season. While freezing temperatures normally can be expected across the Prairies in early September, this freeze was damaging because of the late development of this year's crops. Moderate precipitation, including some snowfall, from August 16 through September 5, interfered with harvesting and continued the decline in crop quality.

EUROPE: NORTH RECEIVES RAIN; EAST MOSTLY DRY

During the period of August 9 through September 10, 1992, moderate and frequent precipitation fell across northern Europe. Drought conditions occurred during much of the growing season (May-July) across Denmark, northern Germany, and Poland. Denmark, which received less than 25 percent of normal precipitation during much of the early summer, received above normal amounts for the 30 days ending September 5. Poland, which was also dry, received 25 to 60 millimeters per week during these 30 days. However, persistent dryness continued across Hungary, Romania, eastern Yugoslavia, and Bulgaria from August into early September, increasing stress on immature summer crops. Moderate-to-heavy precipitation fell across these countries from September 5 through 7, delaying the harvest, but greatly improving surface moisture for winter grain planting.

FORMER SOVIET UNION: RAINFALL AT HARVEST TIME ENDS DRYNESS

The dryness during August 1992 in Eastern Europe, also covered portions of the western former Soviet Union, including much of Moldova, western Ukraine, Belarus, and central region of Russia. This dryness benefited harvesting, but increased stress on late-maturing summer crops and limited moisture for winter grain planting. Widespread, moderate-to-heavy precipitation (25-100 mm) fell between September 7 and 9 over the Baltic, Belarus, and western Ukraine, providing sufficient topsoil moisture for winter grain planting and emergence.

PRODUCTION BRIEFS

AUSTRALIA: RED MEAT PRODUCTION FORECAST DOWN IN 1993

The U.S. agricultural counselor in Canberra is forecasting 1993 red meat production at 2.65 million tons, down 1 percent from the revised 1992 production estimate of 2.69 million. Beef production is forecast at 1.71 million tons, 2 percent below the revised 1992 estimate of 1.74 million. The cattle inventory estimate as of March 31, 1992, was 24.7 million head, down from 25.0 million a year ago. Current assessments indicate that the inventory will drop to 24.4 million head by March 31, 1993, given the fact that cash shortages and dry conditions in New South Wales and Queensland continue to discourage any large-scale herd growth.

Sheep meat production for 1993 is forecast at 615,000 tons, moderately below the 629,000 produced in 1992. As of March 31, 1992, sheep numbers were estimated at 155.5 million head, down 11 percent from a year ago. The current projection points to a 5-percent drop in sheep numbers in 1993, to 147.9 million head, due to heavy culling of wethers, old rams, and other sheep retained specifically for wool production, mainly because wool prices remain depressed.

BRAZIL: LIVESTOCK SITUATION FOR 1993

The U.S. agricultural counselor in Brasilia reports that red meat production in 1993 may reach 5.10 million tons, 3 percent above 1992's estimated output of 4.95 million. Beef production is forecast at 3.90 million tons, up from 3.80 million in 1992, because of good pasture conditions and increased beef production from feedlots. Cattle numbers are expected to continue to decline, from 130.1 million head at the beginning of 1992 to 129.9 million by year's end. The downturn in the numbers reflects uncertainty about Brazil's economic conditions.

Pork production for 1993 is estimated at 1.20 million tons, up from 1.15 million in 1992. Despite a weak economy, pork production continues to expand because large crops of corn and soybeans have lowered feed prices.

BRAZIL: WHEAT HARVEST COMMENCES; YIELD TO DROP SUBSTANTIALLY

At an estimated 3.5 million tons, the 1992/93 wheat crop is Brazil's third consecutive poor harvest, according to the U.S. agricultural counselor in Brasilia. This year's crop is estimated 26 percent below the 5-year average, but up 17 percent from last year. Yield is expected to be the second lowest in 10 years. In addition to a reduction in planted area, the current crop has experienced localized frost, excessive rain, and fungal infestations.

The wheat harvest is underway in the State of Parana, which accounts for over 60 percent of total Brazilian production. Excessive rain, disease problems, and frosts in the southern part of the State have reduced yields. About 35 percent of the crop is in the grain-filling stage, with 40 percent in the grain-ripening stage. Nearly 15 percent of Parana's area had been combined by the end of August. Rio Grande do Sul accounts for 20 percent of the total crop and is normally planted about 1 month behind Parana. The majority of the Rio Grande do Sul crop is in the grain-filling stage.

CIS: LIVESTOCK SECTOR DECLINES REPORTED FOR JANUARY THROUGH JUNE 1992

Livestock production in Russia and other members of the Commonwealth of Independent States (CIS) was down sharply during the first 6 months of 1992, according to the U.S. agricultural minister-counselor in Moscow. The assessment was based on data covering State and collective farms and published by the CIS statistical committee. Historically, State and collective farms account for two-thirds or more of total livestock product output.

CIS: LIVESTOCK PRODUCTION FOR JANUARY-JUNE 1992 1/

<u>Country</u>	<u>Quantity</u>			<u>Percent of 1991</u>		
	<u>Meat</u> <u>(TMT)</u>	<u>2/</u> <u>Milk</u> <u>(TMT)</u>	<u>Eggs</u> <u>(Mil)</u>	<u>Meat</u> <u>-----</u>	<u>Milk</u> <u>Percent-----</u>	<u>Eggs</u> <u>-----</u>
Armenia	7	8	65	46	63	39
Azerbaijan	NA	NA	NA	NA	NA	NA
Belarus	585	2,220	1,048	79	81	93
Kazakhstan	510	1,359	1,188	74	76	86
Kyrgyzstan	53	191	183	79	71	88
Moldova	102	450	291	68	84	76
Russia	3,559	17,222	16,219	77	82	89
Tajikistan	28	115	142	76	81	65
Turkmenistan	38	96	106	78	97	93
Ukraine	1,671	6,982	3,918	78	74	82
Uzbekistan	129	434	518	75	91	68
Total Above	6,682	29,077	23,678	--	--	--

1/ State and collective farms only.

2/ Liveweight basis.

Note: TMT = thousand metric tons.

Livestock numbers on State and collective farms were down also, but the reduction was not as great as the decline in livestock products. July 1 cattle numbers were listed at 78.7 million head, essentially the same as the January 1 census. Cow numbers were given at 24.4 million head, down from 25.0 million in January. Hog numbers were reported at 41.0 million head, 7 percent below the January figure. The number of sheep and goats was reported at 104.3 million head, up 16 percent from January.

FINLAND: FORESTRY SITUATION

Preliminary assessments by the U.S. agricultural attache in Stockholm indicate that Finland's forestry sector will partially recover from the severe downturn experienced during 1991. The timber harvest is expected to decline 10 percent in 1992, to 40.0 million cubic meters (CUM), but fellings of softwood and temperate hardwood logs are projected to increase 12 percent due to greater demand by sawmills. Softwood lumber production is expected to expand 12 percent, to 6.7 million CUM. The projected increase reflects lower domestic raw material prices and Finland's increased competitive position in world markets due to the devaluation of the Finnish mark. Temperate hardwood lumber production is limited by weak domestic demand and competition from veneer manufacturers who are willing to pay higher prices for hardwood logs. Therefore, production in 1992 is expected to remain static at the 1991 level of 60,000 CUM.

Plywood is the most significant panel product manufactured in Finland. However, this sector has been hit hard by the closure of 3 mills, a slowdown in the domestic construction industry, and strong competition from East Asian plywood producers who have made significant inroads into Finland's traditional export markets. While production of softwood plywood is expected to remain at the 1991 level of 70,000 CUM, output of temperate hardwood plywood is forecast at 340,000 CUM, down 17 percent from last year and 30 percent below the previous 5-year average. High domestic production costs and increased production capacity in the United Kingdom, Finland's main export market for board products, is expected to reduce Finland's 1992 output of hardboard, to 50,000 CUM. Particleboard production is projected to remain stable at 385,000 CUM.

Production estimates are as follows in 1,000 cubic meters:

	<u>1990</u>	<u>1991</u>	<u>1992</u> <u>1/</u>
HARVEST	55,130	44,650	40,000
Softwood Logs	19,600	15,220	17,000
Temperate Hardwood Logs	1,560	1,190	1,330
Softwood Lumber	7,400	6,000	6,700
Temperate Hardwood Lumber	68	60	60
Softwood Plywood	90	70	70
Temperate Hardwood Plywood	510	410	340
Hardboard	91	56	50
Particleboard	526	385	385

1/ Preliminary.

FRANCE: RECORD DRIED PRUNE PACK FORECAST

According to the U.S. agricultural minister-counselor in Paris, 1992/93 French dried prune production is expected to total 46,000 tons (packed weight basis), up 14 percent from the July projection. This revised estimate represents an increase of 65 percent over 1991/92's pack, estimated at 27,800 tons, and an 11-percent increase over the record 41,494 tons produced in 1988/89.

INDONESIA: RICE PRODUCTION PROSPECTS IMPROVING

Rice production for the 1992/93 season is pegged at 29.8 million tons, up 0.2 million or nearly 1 percent from last month. The U.S. agricultural counselor in Jakarta reported that the rice crop is in good condition in the major producing areas of Java and Sulawesi. Unseasonable rains during the dry season (June through September) began an early recharge of the low reservoir levels. Nearly 95 percent of Indonesia's total rice output is produced on irrigated land. Java accounted for about 60 percent of Indonesia's 1991/92 rice crop, nearly all of which came from irrigated land.

On Java, conversion of land from agriculture to other commercial uses continues in some of the most productive areas. Estimates of the rate of land conversion vary widely, from about 30,000 hectares to 50,000 hectares per year. By the turn of the century, the cumulative effect of this reduction in area will certainly challenge Indonesia's ability to maintain self-sufficiency in rice.

NEW ZEALAND: LIVESTOCK SITUATION IN 1993

The U.S. agricultural attache in Wellington is forecasting New Zealand's 1993 red meat production at 1.10 million tons, down from 1.12 million last year. The decrease is due to a projected 8-percent reduction in 1993 sheep and goat meat production--down to 490,000 tons from 532,000 tons in 1992--because of reductions in breeding ewe numbers and, therefore a smaller lamb crop. New Zealand's farmers are more dependent on lamb sales than on wool. This practice has tended to reduce the rate of herd culling vis-a-vis Australia. Sheep numbers fell from 55.2 million head in June 1991, to 54.5 million by June 1992. A further decline, to 53.3 million head, is projected by June 1993.

In contrast to sheep and goat meat, beef production is projected to increase 4 percent in 1993, to 560,000 tons. Cattle numbers also have increased, from 8.1 million head in June 1991 to 8.3 million by June 1992. By June 1993, cattle numbers are expected to reach a 10-year high of 8.5 million head due to more favorable prices for beef and dairy products and the substitution of cattle for sheep on North Island.

PAKISTAN: RICE PRODUCTION REVISED LOWER DUE TO FLOODING

Rice production in Pakistan has been revised to 2.8 million tons (milled basis), down 0.4 million from last month, due to extensive rains that caused flooding in the major rice producing districts of the Sindh Province. According to the U.S. agricultural attache in Islamabad, the heavier-than-normal monsoon rains in the IRRI rice producing zones, severe breaches in many canals and salinity drains, and flooding from an overflowing Indus River have caused a reduction in area, to 1.8 million hectares, down 8 percent from last month. An estimated 15-percent of the IRRI rice fields in the Sindh have been either destroyed or severely damaged. Reduced yields are expected from those fields to be harvested in September and October. If the flooding does not subside soon, damage could exceed preliminary estimates. In the Punjab, where most of the basmati rice is grown, flood damage to the crop is not as severe.

PERU: SLOW GROWTH EXPECTED IN POULTRY MEAT OUTPUT

Output of poultry meat in 1992 is estimated at 284,000 tons, 2 percent above the 1991 level, according to the U.S. agricultural attache in Lima. At the beginning of the year, and in accordance with the recent trend, producers envisioned a much larger increase during 1992. However, the continuing recession, coupled with price reductions for competitive meats, caused a sharp decline in demand for poultry meat. With relatively weak demand, wholesale prices (adjusted for inflation) for poultry meat declined 20 percent during 1991 and another 22 percent during the first half of 1992. In an effort to lower input costs, producers have asked the Government to reduce or eliminate the "over rate" tax of 10 percent that is applied to feedgrain imports.

SWEDEN: FORESTRY SITUATION

According to the U.S. agricultural attache in Stockholm, Sweden's forestry sector experienced a difficult year in 1991 and no improvement is expected in 1992 due to low raw material prices and the continuing recession in both the domestic economy and Sweden's key export markets. As a result, the 1992 timber harvest is expected to decline for the third consecutive year, to 62.9 million cubic meters (CUM). While annual fellings trend downward, the quality of Sweden's standing inventory continues to improve as low-yielding areas are replanted with species better adapted to each region. One development that may offset these gains and potentially damage the growing stock is the ongoing acidification of the forest soils and the defoliation of trees, especially in southern Sweden. The defoliation rate of pine and spruce trees is a major concern to the National Board of Forestry (NBF) which is responsible for the inventory and supervision of Sweden's forests. Since the NBF surveys began in 1986, one principal observation has been that the defoliation rate is highest in the southern part of Sweden where the greatest concentration of pollutants occurs. In the Government's 1992/93 budget, funds have been set aside for lime applications in areas where the soil has become highly acidic because of air pollution.

The 1992 production forecasts for wood and wood products indicate a continuation of the downward trends that began in 1991, mainly because of a slowdown in the construction, furniture, and joinery industries. Despite the continuing decline in building activity, the repair and maintenance sector has remained strong. Hence, 1992 production of softwood lumber and plywood is expected to remain essentially unchanged at 11.2 million and 67,000 CUM, respectively. When 5 of the major board factories were declared bankrupt in May 1992, production prospects for hardboard and particleboard became highly uncertain. Currently, production from these units is being maintained at approximately the 1991 level pending a final decision on closure.

Production estimates are as follows in 1,000 cubic meters:

	<u>1990</u>	<u>1991</u>	<u>1992 1/</u>
HARVEST	65,600	63,100	62,900
Softwood Logs	24,700	22,400	22,100
Temperate Hardwood Logs	722	750	740
Softwood Lumber	11,785	11,237	11,200
Temperate Hardwood Lumber	393	375	370
Softwood Plywood	68	67	67
Temperate Hardwood Plywood	2	2	2
Hardboard	219	174	175
Particleboard	843	762	760

1/ Preliminary.

THAILAND: MAIN SEASON RICE CROP UPDATE

Total rice production (milled basis) is estimated at 13.3 million tons, up 0.1 million or 1 percent from last month. The 1992/93 main season rice crop is estimated at 11.9 million tons, according to the U.S. agricultural attache in Bangkok. Increased use of high-yielding varieties is expected to improve yield and boost the main season rice production slightly above last year's 11.6 million ton output.

Monsoon rains have provided adequate moisture for the main season crop since mid-July. Although planting was delayed almost 2 months due to dry weather, farmers quickly completed planting after the rains began. Reportedly, a number of producers switched their planting method from transplanting to pre-germinated seed and broadcasting. In addition, farmers in the lower north and central regions have switched from late-maturing, native varieties to medium and early-maturing varieties. The seed exchange program under the Department of Agricultural Extension, Ministry of Agriculture and Cooperatives continues to benefit farmers by supplying high-quality seed. Approximately 9,000 tons of improved seed, an increase of 45 percent from last year, is being made available in exchange for traditional seed on a 1:1 basis.

URUGUAY AND ARGENTINA: ORANGES AND TANGERINES DAMAGED BY FREEZE

According to the U.S. agricultural counselor in Buenos Aires, a late-season freeze damaged citrus crops along the Uruguay River. Reportedly, the worst damage occurred in the vicinity of Salto, Uruguay, but oranges and tangerines in Concordia, Entre Rios Province, Argentina, also were affected. The lemon producing area of northwestern Argentina was not affected.

WORLD: SUGAR PRODUCTION REVISED UPWARD

World centrifugal sugar production for 1992/93 has been revised upward 2 percent, to 115.8 million tons (raw basis), 2.4 million more than forecast in May 1992 (see WAP 5-92). This is slightly above the revised 1991/92 outturn of 115.3 million tons. Sugar produced from sugarbeets in 1992/93 is forecast at 39.9 million tons, up 5 percent from last season. Sugar produced from sugarcane is expected to decline 2 percent, to 75.9 million tons.

Major 1992/93 changes since the May report include: the European Community, up 1.1 million tons, to 17.0 million; China, up 0.9 million tons, to 8.5 million; the Former Soviet Union (excluding the Baltic States), up 0.7 million tons, to 7.5 million; and Turkey, up 0.2 million tons, to 2.0 million. Partially offsetting these increases are reported downturns for countries in Eastern Europe, where current assessments indicate sugar production will total 4.0 million tons, 380,000 tons less than originally forecast.

The revised 1991/92 production of 115.3 million tons is up 2.6 million tons from the May estimate. The largest revisions were for China, up 1.1 million tons (WAP 6-92) and Cuba, up 1.0 million tons, to 7.0 million tons. Significant increases also were made in the production estimates for Pakistan, Turkey, Philippines, and Vietnam.

ALMOND PRODUCTION IN SELECTED COUNTRIES

Large increases in Spain and the United States are expected to boost almond production in selected countries by 48,900 tons yielding a preliminary 1992/93 forecast of 383,400 tons (shelled basis). If realized, this would be a 15-percent increase over 1991/92, currently estimated at 334,500 tons, but 9 percent below 1990/91's record output of 420,400 tons. Only Morocco, where drought cut the almond crop by 40 percent, recorded a significant decrease from last year.

GREECE: Almond production during the 1992/93 season is forecast at 15,000 tons, 36 percent above the weather-reduced 1991/92 level of 11,000 tons. If realized, this would be the first increase after 3 consecutive years of declining production following the record 1988/89 harvest. Favorable weather during the blossoming period continued through June. The gradual downward trend in planted area appears to have ended, at least temporarily, at 44,800 hectares, 7 percent below the peak in 1986/87. Area harvested actually increased over that period by 58 percent, to an estimated 42,000 hectares in 1992/93. Although Greece's Ministry of Agriculture is willing to support the crop, Greek farmers seem unwilling to continue producing almonds. Those who keep cultivating almonds do so only as a supplemental source of income. Prices are not satisfactory and there are no guaranteed prices from the European Community (EC). Within the framework of EC restructuring programs, the Greek Government is attempting to stabilize almond production at or near present levels, but is only supporting systematically maintained orchards.

ITALY: Almond production for 1992/93 is forecast at 15,000 tons, 36 percent more than the very poor crop of 1991/92. Weather conditions have been favorable with plentiful rainfall during the spring and early-summer months. Reportedly, crop quality is good, particularly the average nut size which is larger than normal. Despite this year's increase, Italian almond production has dropped significantly during the last decade. Production averaged about 35,000 tons during the 1960's. It dropped to about half that level during the 1970's and has remained there. However, prospects in the medium-term indicate a further crop decline. Most almond trees are old and marginally productive. Currently, no efforts are underway to replace them with new orchards. Since the mid-1980's, both planted and harvested area have declined 8 percent, to 120,000 and 118,000 hectares, respectively.

MOROCCO: After 4 consecutive increases, culminating in 1991/92's record crop of 13,230 tons, production is expected to decline 40 percent in 1992/93, to 8,000 tons, due to drought during the blossoming period. Since most almond orchards are not irrigated, the dry spell resulted in lower-than-average fruit size and lower yields. Cold, windy weather in late-March also contributed to the lower yields. The almond crop in Morocco is split between sweet and bitter almonds. Bitter almonds account for about one-fourth of total production. Despite some improvements, production is plagued by archaic cultivation techniques and low yields. Many trees are old and valued more for soil conservation purposes than for their nuts. Planted area has been increasing slowly over the past decade, from 89,000 hectares in 1989/90 to an estimated 114,000 hectares in 1992/93. The Ministry of Agriculture administers programs designed to improve and encourage almond production. The distribution of free

seedlings to growers has been one of the most successful of these programs. The distribution program is designed to provide a cash crop to growers in the countryside. The seedlings are used to replace old trees and to protect soils against hillside erosion. The distribution of seedlings is expected to continue for many years. The Ministry of Agriculture also provides extension services, including information to growers on managing modern orchards.

PORTUGAL: The 1992/93 crop season started well with abundant rainfall during the flowering period. However, this was followed by drought which reduced kernel size resulting in a slight decline in Portugal's 1992/93 almond crop, to a projected 3,400 tons. This is 3 percent lower than the 1991/92 level of 3,500 tons, but 25 percent above the previous 5-year average. An activity in a long period of gradual decline, almond production has been undergoing a restructuring effort since Portugal's 1986 accession to the European Community. According to official statistics, total almond area has increased moderately over the past several years. In 1990 and 1991, EC incentives supported the establishment of modern orchards on 1,700 hectares. However, total area in production has been declining as growers abandoned many of the old, traditional orchards because of increasing production costs and competition from imports. Harvested area is forecast at 42,000 hectares.

SPAIN: Spain's 1992/93 almond production is forecast at 75,000 tons, 30 percent above the 1991/92 crop and 25 percent above the previous 5-year average. Late-spring frosts in northern Granada caused some losses. However, the weather has been generally good in the other almond growing regions. Crop quality and kernel size are expected to be good. Cultural practices, pest and disease control, and storage facilities have improved in recent years despite rising input costs, labor recruiting problems, and low grower prices. In an effort to improve the quality and marketing of tree nuts and locust beans, in March 1989, the European Community Council instituted a 10-year program to assist production in the EC by subsidizing producer organizations. Almond area devoted to quality improvement is 273,500 hectares. Spain's total almond area is estimated at 648,000 hectares, of which 600,000 hectares are bearing. An estimated 10 to 15 percent of almond area is under irrigation. About 75 percent of the irrigated area is located in the Levant (Alicante and Murcia Provinces) and 20 percent in Andalusia, notably Almeria and Granada Provinces.

TURKEY: Due to favorable weather, Turkey's 1992/93 almond crop is forecast at a record 17,500 tons. This is a 9-percent increase over the 1991/92 harvest of 16,000 tons. After declining steadily through most of the 1980's, total tree numbers are expected to increase for the fourth straight year, to an all-time high of 4.8 million trees, a record 4.1 million of which are bearing.

UNITED STATES: U.S. almond production in 1992/93 is forecast at 249,480 tons, up 12 percent from the 1991/92 level of 222,260 tons, but 5 percent below the previous 5-year average. Trees in the San Joaquin Valley are exhibiting a lighter nut set than the trees to the north in the Sacramento Valley. However, the overall nut set is higher than in 1991/92. The low nut set in the San Joaquin Valley may be the result of reduced water supply. Insects also have been a problem, appearing unusually early in the growing season and in large numbers. Estimated bearing area in 1992/93 is 153,780 hectares.

ALMOND PRODUCTION
(1,000 Metric tons - Shelled Basis)

	<u>1988/89</u>	<u>1989/90</u>	<u>1990/91</u>	<u>1991/92</u>	<u>1992/93</u> <u>1/</u>
Greece	19.0	17.2	15.5	11.0	15.0
Italy	14.0	18.0	19.0	11.0	15.0
Morocco	7.4	11.1	11.5	13.2	8.0
Portugal	0.9	3.5	3.0	3.5	3.4
Spain	40.0	80.0	57.0	57.5	75.0
Turkey	14.0	15.0	15.0	16.0	17.5
United States	267.6	222.3	299.4	222.3	249.5
Total	362.9	367.1	420.4	334.5	383.4

1/ Preliminary.

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HAZELNUT PRODUCTION IN SELECTED COUNTRIES

Early season projections indicate record crops in Turkey and the United States will boost hazelnut production in selected countries to a new high. Preliminary assessments put combined output for 1992/93 at 755,490 tons (inshell basis), 30 percent higher than the 1991/92 harvest and 12 percent above the previous record set in 1989/90.

ITALY: Hazelnut production in 1992/93 is projected at 110,000 tons, 21 percent less than last season's record crop. The weather has been generally favorable with plentiful rains during the spring and early summer months followed by warm, humid conditions in July and August. Given stable area and normal yields, the decline can be attributed to the cyclical fluctuations in hazelnut productivity.

SPAIN: Spain's hazelnut production is expected to total 21,900 tons in 1992/93, 29 percent higher than 1991/92's drought-reduced crop. Growing conditions have been generally favorable and rainfall timely. Reportedly, crop quality is good. After increasing more than 50 percent since 1970, planted area has stabilized at around 33,000 hectares, of which approximately 43 percent is irrigated. Yields from irrigated orchards average about 1,500 kilograms per hectare compared to 450 kilograms from rain-fed orchards. In recent years, low producer prices and rising production costs, particularly labor, have discouraged Spanish growers from using appropriate cultivation techniques. Consequently, many orchards are showing signs of deterioration. However, under the EC's 10-year quality improvement program, Spain's hazelnut orchards eventually will be upgraded.

TURKEY: Nearly ideal growing conditions this spring and summer are expected to result in a record hazelnut crop of 600,000 tons in 1992/93. This is 20 percent higher than the previous record set in 1989/90 and 50 percent greater than the 400,000 tons produced in 1991/92. Hazelnut production in Turkey has risen an average of 12 percent per year since 1980. This trend is expected to continue as high support prices encourage farmers to continue expanding hazelnut plantings throughout the flat, productive valleys. Traditionally, hazelnuts were planted mostly on hillsides.

UNITED STATES: The 1992/93 hazelnut crop is forecast at a record 23,590 tons, up 2 percent from the previous high of 23,130 tons in 1991/92. The exceptionally mild winter was followed by a record warm, dry spring causing hazelnuts to mature approximately 3 weeks earlier than normal.

HAZELNUT PRODUCTION (1,000 Metric tons - Inshell Basis)

	<u>1988/89</u>	<u>1989/90</u>	<u>1990/91</u>	<u>1991/92</u>	<u>1992/93</u> <u>1/</u>
Italy	140.0	140.0	80.0	140.0	110.0
Spain	17.5	25.0	21.2	17.0	21.9
Turkey	410.0	500.0	430.0	400.0	600.0
United States	15.0	11.8	19.7	23.1	23.6
Total	582.5	676.8	550.9	580.1	755.5

1/ Preliminary.

PISTACHIO PRODUCTION IN SELECTED COUNTRIES

Even though 1992/93 is an on-year in the alternate bearing cycle of the U.S. pistachio crop, the projected increase is not expected to be sufficient to offset the sharp downturn anticipated in the off-year crops in Italy and Turkey. Preliminary assessments put combined 1992/93 pistachio production in selected countries, not including Iran, at 97,200 tons (inshell basis). If realized, this season's harvest would rank second only to last year's record outturn of 107,200 tons.

GREECE: Pistachio production during 1992/93 is forecast at 3,000 tons, 30 percent higher than in 1991/92 and 14 percent above the 1990/91 crop. Growing conditions were favorable and nut quality appears satisfactory. Although pistachios are aided within the EC's restructuring programs, very limited growth in Greek production is expected in the future. Current production levels meet the Greek Government's goals of satisfying domestic demand and trade requirements.

ITALY: Among commercial pistachio producers, Italy's crop exhibits the most pronounced cyclical fluctuation. Traditional cultivation practices call for growers to radically prune trees in the spring of every off-year in order to boost production during on-years. Consequently, production in 1992/93, an off-year, is forecast at only 300 tons. Output in 1991/92, an on-year, has been revised downward by 500 tons, to 3,000 tons. Excess rain and hail storms in September 1992 adversely affected the crop.

SYRIA: Pistachio production continues to grow rapidly in Syria. Production in 1992/93 is projected at 24,000 tons, 9 percent higher than the 1991/92 harvest of 22,000 tons. If realized, 1992/93 would mark the fourth consecutive record crop. Syrian pistachio production averaged only about 1,200 tons during the 1960's. This quadrupled to an average of nearly 4,800 tons in the 1970's. The production average almost tripled in the 1980's, to 12,000 tons, and, 3 years into the 1990's, production already averages 22,000 tons. Planted area has increased 11-fold since 1970, to an estimated 75,000 hectares in 1992/93, as did total trees which now number 14.0 million. The majority of trees are young and have not yet reached bearing age. The average yield per tree is rising with the increase in the age of planted trees. Consequently, the upward trend in Syrian pistachio production will continue. This expansion is being encouraged by the Government which provides seedlings at nominal prices and restricts imports.

TURKEY: The 1992/93 season is an off-year for the Turkish pistachio crop. In addition, a late frost in May further reduced production potential. The forecast for 1992/93 is 20,000 tons, 56 percent below 1991/92's on-year crop, but 43 percent higher than the last off-year crop. The production estimate for 1991/92, an on-year aided by favorable weather, has been revised to a record 45,000 tons, 29 percent greater than the previous on-year crop. Official data on tree numbers show that pistachio production continues to expand in southeastern Turkey. Formerly, Gaziantep was the only pistachio growing Province. Official statistics now indicate that the total number of pistachio trees in Sanliurfa Province is about double the number in Gaziantep. Pistachios also are being planted in several other Provinces, mainly replacing olive trees. The total number of pistachio trees in Turkey has increased 126 percent since 1970, reaching an estimated 41.0 million in 1992/93. Over the same period, bearing tree numbers have increased 106 percent, to 22.5 million.

UNITED STATES: In the United States, 1992/93 is an on-year for pistachio production. Output is forecast at 49,900 tons, up 43 percent from the off-year harvest of 34,930 in 1991/92, but 8 percent below 1990/91's on-year record crop. Although the number of pistachio clusters is reportedly at a record level this season, the amount of blanks also is estimated to be higher.

PISTACHIO PRODUCTION
(1,000 Metric tons - Inshell Basis)

	<u>1988/89</u>	<u>1989/90</u>	<u>1990/91</u>	<u>1991/92</u>	<u>1992/93</u> <u>1/</u>
Greece	3.0	4.9	2.6	2.3	3.0
Italy	0.3	3.3	0.3	3.0	0.3
Syria	17.9	15.8	20.0	22.0	24.0
Turkey	15.0	35.0	14.0	45.0	20.0
United States	42.6	17.7	54.4	34.9	49.9
Total	78.8	76.7	91.3	107.2	97.2

NOTE: Iran is excluded from this report due to lack of current, verifiable information.

1/ Preliminary.

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WALNUT PRODUCTION IN SELECTED COUNTRIES

A projected 87-percent increase in French walnut production and modest increases in other countries were not enough to offset the substantial decline projected in U.S. production. Combined walnut production for 1992/93 is forecast at 483,500 tons (inshell basis), 4 percent lower than 1991/92's estimated production of 501,100 tons.

CHINA: China's 1992/93 walnut output is expected to expand for the third straight year, to 160,000 tons. This is a 5-percent increase over 1991/92 and 7 percent greater than the 1990/91 crop. However, it is still 10 percent lower than the record crop in 1988/89. Last season, China allowed walnut producers to sell their nuts to the highest bidder. In the past, walnut producers could sell only to government agencies. Producers have responded to this development with intensified efforts to improve their production capabilities through the use of improved varieties and better management practices. The opening of the market, combined with China's previous research and development on new varieties and techniques, is expected to provide the incentive and the means to increase production substantially over the next several years. However, the relatively poor transportation network, a shortage of storage facilities, and limited processing technology in the producing areas probably will constrain China's walnut production from reaching its full potential.

FRANCE: Favorable weather conditions and a recovery in production potential following the frost-reduced crop of 1991/92 is expected to result in the largest French walnut crop since the 1982/83 season. The forecast of 31,000 tons is 87 percent greater than the 1991/92 harvest and 33 percent above the previous 5-year average. Walnut production in southwestern France, where nearly half the walnuts are grown, is expected to be up 3-fold over 1991/92's abnormally low crop. The quality of the 1992/93 crop is reportedly good with a significant share of large-sized fruits. The area planted to walnut orchards is expected to rise for the third consecutive year, to 14,700 hectares, an increase of 6 percent since the 1989/90 season. This follows a decline of 10 percent between 1987/88 and 1989/90 that was due to the insufficient renewal of orchards during the late 1970's and early 1980's as well as the destruction of numerous walnut trees by a series of violent storms. In spite of larger plantings in the past few years, the projected walnut bearing area in 1992/93 is still 11 percent less than in 1980/81.

INDIA: Walnut production in India is projected to reach 20,000 tons in 1992/93, 11 percent greater than the weather-reduced crop of 1991/92. The continuing civil unrest in the State of Jammu and Kashmir, where 98 percent of the walnuts are grown, has led to curfews, restrictions on movements, and some disruption in orchard maintenance. However, good weather has helped offset the negative impact of orchard neglect. Trees received adequate moisture during the flowering and fruit formation period during April and May. Dry weather during June and July is not expected to have adversely affected the crop. The kernel color of the 1992/93 crop is expected to be normal with an average nut size of 24 to 26 millimeters. The crop also is reported to be disease-free. After increasing 17 percent between 1982/83 and 1990/91, to 35,000 hectares, area planted to walnut orchards has remained relatively constant, mainly because the political turmoil frequently has hampered agricultural activities. However, as trees matured, harvested area continued to increase, reaching an estimated 26,400 hectares by 1992/93.

ITALY: Preliminary assessments indicate that, in 1992/93, Italy will harvest 13,000 tons of walnuts, moderately above 1991/92's poor crop of 12,000 tons. The long-term outlook for Italian walnut production is not favorable. Growers continue to cut their walnut trees to obtain high profits from the sale of the wood; however, no replacement planting is occurring. Between 1984/85 and 1992/93, planted area declined 53 percent, to an estimated 6,500 hectares. During the same period, area harvested dropped 57 percent, to 5,800 hectares. In general, Italy's walnut trees are old and only marginally productive. The situation is not expected to change in the near future.

TURKEY: Posting a third consecutive increase, walnut production in Turkey is projected at 69,000 tons, a 3-percent increase over 1991/92 and the highest level since the 1985/86 season. Walnut production in Turkey has been trending downward since the late 1970's and the recent upturn is the first somewhat sustained increase since then. However, the forecast for the 1992/93 crop is still well below the peak of 105,000 tons reached in 1977/78. The total number of walnut trees has increased 9 percent over the last 4 years, reaching an estimated 4.5 million in 1992/93. The number of bearing trees in 1992/93 is forecast at 3.3 million, nearly equal to the peak levels of the mid-1970's.

UNITED STATES: Walnut production for 1992/93 is forecast at 190,510 tons, nearly one-fifth lower than 1991/92's record crop of 234,960 tons and 10 percent below the previous 5-year average. Reportedly, the nut set per tree is down 30 percent, but larger nut sizes are expected. While weather during most of the 1992/93 season has been favorable for kernel development, high summer temperatures and an incidence of blight have adversely affected the crop.

WALNUT PRODUCTION
(1,000 Metric tons - Inshell Basis)

	<u>1988/89</u>	<u>1989/90</u>	<u>1990/91</u>	<u>1991/92</u>	<u>1992/93</u> <u>1/</u>
China	177.1	160.1	149.6	152.5	160.0
France	22.8	25.8	24.6	16.6	31.0
India	18.0	17.0	20.0	18.0	20.0
Italy	11.0	18.0	18.0	12.0	13.0
Turkey	64.0	64.0	65.0	67.0	69.0
United States	189.6	207.8	205.9	235.0	190.5
Total	482.5	492.7	483.1	501.1	483.5

1/ Preliminary.

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CHINA: The 1992 roundwood harvest is forecast at 115.0 million cubic meters (CUM), slightly below the revised 1991 level. Reduced estimates for both hardwood and softwood logs contributed to the decline. Among the milled products, estimated output of both softwood and hardwood lumbers is projected down in 1992, while production of plywoods and other board products are expected to increase.

The increase in roundwood production in 1991 reversed a 3-year downtrend fueled by declining domestic demand, the gradual depletion of large diameter logs, and government restrictions on the use of wood for construction. The turnaround resulted from an improvement in domestic demand and an increase in fellings of fast-growing species used mainly for paper production. However, cutting restrictions, government substitution policies, and efforts by Chinese authorities to control the pace of economic growth reportedly will limit the 1992 timber harvest to less than one-half the maximum cutting quota of 243.6 million CUM. Additional monitoring stations set up by the Ministry of Forestry are helping to enforce the quota restrictions and check illegal cutting.

China's total forested area is estimated at 128.0 million hectares or 13 percent of the country's area. The Government plans to expand forested area to 17 percent by the year 2000 via large-scale reforestation projects which focus on shelterbelts and wood bases. China's Eighth 5-Year Plan (1991-1995) calls for the expansion of forestry resources and more efficient utilization of existing resources. Although the resource base is approximately 10.9 billion CUM, only about 15 percent is mature, harvestable timber. Assuming the continuation of current consumption levels, the Ministry of Forestry (MOF) is projecting that all commercially harvestable stocks could be depleted within the next 10 years. In Heilongjiang Province, 22 of the 40 forestry bureaus report dwindling supplies of commercially marketable logs; 8 of the bureaus no longer have trees to cut. To encourage afforestation, the Government provides seedlings and technical services to all individuals who want to plant trees and allows them to retain ownership of all trees they plant.

The declining supply of logs, escalating stumpage prices, increasing labor costs, and government restrictions on the use of wood products for many construction and maintenance activities have curtailed lumber production for the past several years. Production of softwood and hardwood lumber in 1992 is expected to decline to 16.5 million and 10.1 million CUM, respectively. In contrast, production of panel products has been trending upward since 1990. Between 1990 and 1991, combined output of plywood and board products increased 11 percent, to 2.6 million CUM, due to the improved economic climate and expansion in the furniture industry. Production of panel products in 1992 is expected to expand only 2 percent, to 2.7 million CUM, because of quality problems and shortages of raw materials, inputs, equipment, energy, and financing. The MOF remains committed to eliminating non-essential uses of wood and efficiently utilizing existing wood resources. The focus of government programs and policies has shifted away from single-use sawmills toward integrated operations. The MOF considers sawmills, in combination with particleboard and fiberboard operations, as the most effective and profitable way to utilize China's existing resources. To secure this end, the bulk of government and foreign investment has and will probably continue to be in the board manufacturing sector.

CHINA: FORESTRY PRODUCTION
(1,000 Cubic meters)

	<u>1990</u>	<u>1991</u>	<u>1992</u> <u>1/</u>
HARVEST	111,420	116,000	115,000
Softwood Logs	69,080	72,200	71,875
Temperate Hardwood Logs	42,340	43,800	43,125
Softwood Lumber	17,650	17,030	16,500
Temperate Hardwood Lumber	10,819	10,400	10,100
Softwood Plywood	610	625	640
Temperate Hardwood Plywood	149	155	160
Fiberboard	1,172	1,375	1,410
Particleboard	428	455	465

1/ Preliminary.

INDONESIA: At the beginning of 1992, Indonesia's forest area was approximately 144.0 million hectares. Of this total, 70.0 million hectares are "production" or "limited production" forest assigned to concession holders or set aside for commercial logging operations. There is some concern that a large portion of the "production" forest has already been denuded through legal or illegal logging, forest fires, and rural development near logging sites. Based on current extraction rates, forest industry projections indicate that the supply of logs in Sumatra and Kalimantan could be depleted within the next 15 years. To avoid this outcome and because the forest products sector is vitally important to the Indonesian economy, the Government has implemented a system of sustainable forest development that emphasizes conservation, replanting, and the establishment of timber plantations. The annual timber cut is limited, by law, to 31.4 million CUM--a level which the Government has determined will meet the raw material requirements of the downstream processing industries, yet ensure an adequate supply of logs for the years ahead.

Output of tropical hardwood logs during 1992 is forecast at 26.5 million CUM, slightly below the volume cut in 1991. The downturn reflects the Government's consistent enforcement of forestry regulations and logging restrictions, the greater distances between logging and milling sites, and dry conditions in late 1991 and early 1992 that sharply lowered river levels thus slowing the movement of logs from the felling operations to the mills.

Indonesia's production of tropical hardwood lumber is expected to decline 2 percent from last year, to 8.3 million CUM, primarily because of reduced log production, less emphasis on lumber production vis-a-vis higher-value products, government restrictions on investment in the sawn timber industry, more substitution of cement and steel for lumber in building applications, and declining demand from the construction sector due to high interest rates. Tropical hardwood plywood is the mainstay of the Indonesian forest products industry. Production in 1992 is forecast at a record 9.7 million CUM due to higher extraction efficiency rates that compensate for reduced log supplies as well as continued heavy demand for Indonesian plywood in export markets. Tropical hardwood veneer production, forecast at 55,000 CUM, is a small segment of Indonesia's forest products industry. However, production in 1992 is expected to expand 10 percent in line with the growing domestic demand for fancy plywood. Production in the particleboard sector is expected to expand 3 percent in 1992, to 330,000 CUM. Indications that the Government will relax its tight monetary policy is expected to fuel demand in the construction and housing industries, thus stimulating production in the particleboard sector.

INDONESIA: FORESTRY PRODUCTION
(1,000 Cubic meters)

	<u>1990</u>	<u>1991</u>	<u>1992</u> <u>1/</u>
Tropical Hardwood Logs	27,000	27,000	26,500
Tropical Hardwood Lumber	9,000	8,500	8,300
Tropical Hardwood Plywood	9,250	9,600	9,700
Tropical Hardwood Veneer	44	50	55
Particleboard	310	320	330

1/ Preliminary.

JAPAN: Japan's economic recession and dwindling supply of domestic logs, coupled with resource conservation and value-added processing in the major raw material producing countries throughout Asia, has sent Japanese production of wood and wood products spiraling slowly downward for the past several years. The decline in domestic log production continues unabated mainly because of the poor quality of the wood, de-population near logging sites, and the fact that 69 percent of the forest industry's workforce is 50 years of age or older.

Continued sluggishness in the building and furniture industries is the main reason for the downturn in lumber and panel product production. Although the dominant share of Japan's plywood production is tropical hardwood plywood, output of softwood plywood has increased steadily since 1987. The ongoing decline in the availability of tropical hardwood logs is forcing some Japanese plywood manufacturers to shift to softwood plywood production.

JAPAN: FORESTRY PRODUCTION
(1,000 Cubic meters)

	<u>1990</u>	<u>1991</u>	<u>1992</u> <u>1/</u>
HARVEST	29,300	27,938	27,000
Softwood Logs	16,775	15,794	15,000
Temperate Hardwood Logs	2,219	1,988	1,800
Softwood Lumber	26,551	25,398	24,800
Temperate Hardwood Lumber	1,365	1,239	1,150
Tropical Hardwood Lumber	1,865	1,627	1,550
Temperate Hardwood Veneer	178	164	150
Tropical Hardwood Veneer	6,924	6,208	6,000
Softwood Plywood	216	238	260
Temperate Hardwood Plywood	219	217	215
Tropical Hardwood Plywood	6,304	6,134	6,000
Hardboard	145	133	125
Medium Density Fiberboard	264	276	265
Particleboard	1,072	1,097	1,050

1/ Preliminary.

KOREA: Roundwood production in 1992 is forecast at 1.3 million CUM, slightly above the 1991 harvest, but well below Korea's felling capacity of 1.6 million CUM, due to weak domestic demand for Korea's poor quality timber, reduced exports of most wood-based products, and increased imports of processed wood. Softwood lumber, the major sawnwood produced in Korea, is used mainly by the construction industry for concrete forming and scaffolding. In an effort to slow the overheated economy, the Government extended, through 1992, restrictions on new construction that were instituted in mid-1991. The impact of these restrictions has been to slow the rate of growth in demand rather than actual demand, which remains strong in the construction industry and in other wood processing sectors such as furniture manufacturing. Hence, output of softwood lumber during 1992 is forecast at 3.9 million CUM, only marginally below the 1991 level. Production of tropical hardwood lumber is expected to decline for the second consecutive year, to 1.1 million CUM, due to strong competition from plywood mills for imported tropical logs, an increase in lumber milled from imported softwood logs, and rising imports of tropical hardwood lumber. The slowdown in production of both softwood and tropical hardwood lumber reflects increasing restrictions on log exports by major supplying countries and rising labor costs in Korea which make imports of lumber processed offshore more cost-effective. In contrast, strong demand by the furniture industry is expected to boost production of temperate hardwood lumber 41 percent in 1992, to 45,000 CUM.

Korea's panel products sector has grown steadily for the past several years. Production of tropical hardwood plywood is forecast at 1.2 million CUM, up 6 percent from 1991, due to the recent opening of a new plywood plant. Given that tropical hardwood plywood has many end-uses, i.e. construction materials, freight containers, and furniture manufacturing, it is anticipated that plywood mills will begin to outbid lumber mills for imported logs in order to maximize the use of existing capacity. Korea's capacity to produce board products has expanded substantially during the past 2 years. Two new plants capable of manufacturing either hardboard or medium density fiberboard (MDF) became fully operational in early-1991. Production of MDF more than doubled between 1990 and 1991, to 242,000 CUM; a 24-percent increase, to 300,000 CUM, is projected in 1992. Hardboard production in 1992 is forecast at 60,000 CUM, up 3 percent from last year. Hardboard production is trending upward slowing because the current focus of the industry is on MDF production. Particleboard production during 1992 is forecast at 300,000 CUM, nearly double the 1991 volume. One new particleboard mill opened in early-1992. When two additional facilities are operational in 1993, Korea's total annual production capacity will rise to 640,000 CUM.

KOREA: FORESTRY PRODUCTION
(1,000 Cubic meters)

	<u>1990</u>	<u>1991</u>	<u>1992</u> <u>1/</u>
HARVEST	1,138	1,286	1,300
Softwood Lumber	3,481	3,946	3,900
Temperate Hardwood Lumber	47	32	45
Tropical Hardwood Lumber	1,350	1,158	1,100
Tropical Hardwood Plywood	1,124	1,134	1,200
Hardboard	54	58	60
Medium Density Fiberboard	113	242	300
Particleboard	165	155	300

1/ Preliminary.

MALAYSIA: Malaysia is the world's largest producer of tropical hardwoods. The 1992 harvest is forecast at 39.0 million CUM, 38.5 million of which are expected to be tropical hardwood logs. Total forest area, annual fellings, and log production have been trending downward for several years in line with the Government's efforts to conserve forest resources through land management and cutting restrictions. At the beginning of 1992, Malaysia's total forest area was approximately 19.2 million hectares--6.0 million in Peninsular Malaysia, 4.4 million in Sabah, and 8.7 million in Sarawak. Of this total, 12.7 million hectares have been set aside as Permanent Forest Estate (PFE). About 9.0 million hectares within the PFE have been designated "Productive Forests" where forest management practices have been designed and implemented to ensure a long-term supply of timber resources for commercial logging.

In the Sixth Malaysian Plan (SMP) covering the period 1991 through 1995, the Government set targets for reductions in tropical log production. The projected target levels, by region, are as follows in 1,000 CUM:

	<u>1991</u>	<u>1995</u>
Peninsular Malaysia	12,016	8,500
Sabah	8,163	4,500
Sarawak	19,410	16,000
Total	39,589	29,000

Under the SMP, the pace of new land development will be reduced due to the declining availability of suitable new land and the need to preserve the remaining forest land. To meet these objectives, the Government plans to begin intensive rehabilitation and reforestation of degraded forests. This is a turnaround from the policies of the past 3 decades when large tracts of high-quality lowland forest areas were clear-cut for agricultural or commercial development. The SMP also calls for substantial growth in Malaysia's output of value-added products. For the duration of the SMP, the Government will ensure that a minimum of 19.0 million CUM of domestic logs are available annually for down-stream processing plants.

Tropical hardwood lumber is the mainstay of Malaysia's wood products industry. Production in 1992 is forecast at a record 9.1 million CUM, up 3 percent from 1991. Further expansion in this sector is anticipated, given the steady increase in the number of licensed sawmills in all 3 regions and continued strong demand from the construction industry and overseas markets.

The manufacture of plywood and veneer is the second most important wood processing activity in Malaysia. Preliminary assessments indicate that production of plywood and veneer will reach record levels in 1992. Most of the growth is expected in Sarawak, where last year's increase in the Log Export Restriction Quota--from 15 to 20 percent of total output--made more logs available for domestic processing and encouraged investors to build additional plywood mills.

Continued expansion is anticipated in the particleboard sector. Production in 1992 is forecast at a record 130,000 CUM, an 8-percent increase from 1991. The switch in raw material input from low-quality tropical hardwood wastes to the more suitable rubberwood, together with growing domestic and export demand, is expected to stimulate growth in this sector for the next several years.

MALAYSIA: FORESTRY PRODUCTION
(1,000 Cubic meters)

	<u>1990</u>	<u>1991</u>	<u>1992</u> <u>1/</u>
HARVEST	40,100	39,590	39,000
Tropical Hardwood Logs	39,655	39,055	38,460
Tropical Hardwood Lumber	8,780	8,860	9,100
Tropical Hardwood Plywood	1,363	1,680	1,800
Tropical Hardwood Veneer	480	830	900
Particleboard	110	120	130

1/ Preliminary.

PHILIPPINES: Forestry is not a growth industry in the Philippines. Total annual fellings have declined steadily since 1987 and are expected to hit a record-low 1.6 million CUM in 1992. Forest fires in drought-stricken Mindanao are partially responsible for the poor prospects this year. Heavy losses occurred in northeastern and southern Mindanao, where 2,500 hectares of reforested areas and forest reserves were lost. Also contributing to the ongoing decline in the industry is the Government-mandated shift of logging operations from virgin (old-growth) forests to residual (second-growth) forests. Concurrent with the January 1992 ban on logging in virgin forests, the Department of Environment and Natural Resources (DENR) suspended all 58 Timber License Agreements (TLA) because nearly one-half of the Philippine's virgin forests are located within TLA concession areas. Thirty TLA holders were granted temporary permits which only allowed logging of residual forests within any given concession area. However, several of the smaller firms did not even bother to apply for these permits having determined it would not be economically viable to continue their operations based solely on their concession area's residual forests. Thus, by the end of 1992, the Philippine forestry sector will most likely be dominated by large integrated companies capable of efficiently managing the forest resources in their concession areas and who have the financial means to retool and modernize their downstream operations. In the meantime, the 10-percent decline in tropical hardwood log production forecast for 1992 is expected to adversely impact the entire wood products sector. Production of tropical hardwood lumber is forecast at 650,000 CUM, down 8 percent from 1991. Price increases generated by the reduced timber supply and the lack of competitiveness of Philippine products in world markets are expected to result in a 7-percent reduction in veneer production during 1992, to 50,000 CUM, and drop plywood production to a record-low 300,000 CUM.

PHILIPPINES: FORESTRY PRODUCTION
(1,000 Cubic meters)

	<u>1990</u>	<u>1991</u>	<u>1992</u> <u>1/</u>
HARVEST	2,596	1,779	1,600
Tropical Hardwood Logs	2,156	1,265	1,000
Tropical Hardwood Lumber	841	706	650
Tropical Hardwood Plywood	397	306	300
Tropical Hardwood Veneer	49	54	50

1/ Preliminary.

TAIWAN: The outlook for Taiwan's forestry sector remains bleak. Roundwood production continues to decline due to poor access to remaining timber stands, spiraling input costs, labor shortages, and intensifying environmental concerns. The current Six-Year Forest Plan (FY 1992 through 1997) addresses these environmental concerns by emphasizing reforestation. The Plan's policies are designed to meet the following objectives: increased plantings of high-quality trees; timber stand improvements; conservation of natural stands; and sustained yield management. Currently, logging is prohibited in protected forests, national parks, watersheds in the upstreams of reservoirs, ecological areas, and areas which cannot be reforested immediately.

The annual Forest Management Plan restricts Taiwan's annual timber cut to 200,000 CUM. Total fellings in 1992 are forecast at only 60,000 CUM, a 19-percent drop from last year and well below the Plan's maximum target. The impact of this decline will be seen in the low production levels forecast for softwood and tropical hardwood logs. Softwood log production is expected to decline 20 percent in 1992, to 40,000 CUM; a 17-percent downturn, to 20,000 CUM, is projected for tropical hardwood logs.

Taiwan's 1992 production of softwood lumber is expected to remain relatively stagnant at 40,000 CUM due to dwindling supplies of softwood logs. Production of temperate hardwood lumber is projected to decline 67 percent, to 195,000 CUM, mainly due to the declining availability of logs and decreased demand resulting from the ongoing exodus of furniture manufacturers to other southeast Asian countries where cheap, unskilled labor is plentiful. Output of tropical hardwood lumber is forecast at 200,000 CUM, down 6 percent from a year ago, due to the shortage of raw material and stagnant demand.

The declining availability of domestic and imported tropical hardwood logs, coupled with Taiwan's skilled and costly labor force, continues to adversely affect the panel products sector. Production of tropical hardwood plywood is expected to record the largest shortfall in 1992, a 10-percent decline, to 375,000 CUM. Productivity in the plywood sector continues to fall as increasing numbers of plywood plants relocate to lower-cost areas such as Malaysia. Particleboard production is expected to rebound 21 percent in 1992, to 109,000 CUM. The upturn reflects the substitution of particleboard for diminished lumber supplies and as a base for veneer used in the manufacture of low-quality furniture and cabinets.

TAIWAN: FORESTRY PRODUCTION
(1,000 Cubic meters)

	<u>1990</u>	<u>1991</u>	<u>1992</u> <u>1/</u>
HARVEST	114	74	60
Softwood Logs	67	50	40
Tropical Hardwood Logs	47	24	20
Softwood Lumber	36	42	40
Temperate Hardwood Lumber	574	594	195
Tropical Hardwood Lumber	170	212	200
Temperate Hardwood Veneer	217	213	210
Tropical Hardwood Veneer	648	637	625
Tropical Hardwood Plywood	484	417	375
Particleboard	105	90	109

1/ Preliminary.

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